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New in this release

The following sections detail what is new in the *Avaya Aura™ Agent Desktop User Guide* (NN44400-114).

- Features (page 7)
- Other changes (page 10)

Features

See the following sections for information about feature changes:

- Improved user interface (page 7)
- Multiplicity (page 7)
- New contact types (page 8)
- Agent statistics (page 8)
- E-mail editor improvements (page 8)
- E-mail auto suggest (page 9)
- New usage modes (page 9)
- Web communications improvements (page 10)

Improved user interface

The main Avaya Aura™ Agent Desktop user interface is based on a work item paradigm. Each agent-to-customer interaction is a work item. Work items appear on the Agent Desktop work list. If you perform another interaction associated with that work item (for example an IM consultation with an expert), then that interaction is displayed as part of the original work item.

The work list window contains work items and buttons corresponding to the work item. The buttons and functions change depending on the items in the work list window. When a new contact arrives, Agent Desktop adds the new contact to the work list.

- A work item is a unit of work that is a collection of interactions with other parties. The party can be a customer, another agent, a supervisor or an expert.
- A work list is a collection of work items.

Multiplicity

Agents who handle real-time voice contacts require dedicated interaction between an agent and customer. To increase agent productivity for non real-time contacts, agents can use Contact Center to simultaneously handle multiple contacts.

The administrator selects the contact types an agent can be presented with while the agent is active on another contact. This is called interruptibility. You can receive a multimedia contact while you are working on a voice call, or, you can receive a voice contact while you are working on a multimedia contact.

New contact types

Agent Desktop supports Short Message Service text messaging, fax messages, voice mail messages, and scanned documents.

Short Message Service (SMS) text messaging is a standardized communications protocol for the exchange of short text messages between SMS-enabled devices. SMS text messages from customers are forwarded by an SMS gateway to an e-mail address within the contact center. The Contact Center Multimedia E-mail Manager retrieves the SMS text message and queues it to the appropriate skillset.

Fax messages from customers are forwarded by a fax server to an e-mail address within the contact center. The Contact Center Multimedia E-mail Manager retrieves the fax attachment in TIFF format and queues it to the appropriate skillset.

Voice mail messages from customers are forwarded by a voice mail server to an e-mail address within the contact center. The Contact Center Multimedia E-mail Manager retrieves the voice mail attachment in WAV format and queues it to the appropriate skillset.

A scanned document is an electronic version of a printed page or document. Scanned documents from customers are forwarded by a document imaging server to an e-mail address within the contact center. From here, the Contact Center Multimedia E-mail Manager retrieves the scanned document attachment in TIFF format and queues it to the appropriate skillset.

Agent statistics

Agent Desktop now displays skillset-related statistics. You can view skillset related statistics on the action bar or in more detail in pie chart or bar chart format in the Statistic control. Supervisors can display statistics for all skillsets in pie chart or bar chart format.

E-mail editor improvements

The Agent Desktop e-mail editor supports the following features.

- Undo (Ctrl+z) support
- Colored text
- Highlighted text
- Ruled lines

- Insert image links
- Hyperlinks
- Blind carbon copy (Bcc) is available only when using the e-mail address book.

E-mail auto suggest

Agent Desktop now supports E-mail Auto Suggest.

When an incoming e-mail arrives at the contact center, the E-mail Manager uses a set of rules to determine recommended replies for the e-mail message. The suggested replies for the e-mail message are shown in order of relevance.

You can open the new e-mail, read it, and then choose a suggested reply to the e-mail message. A preview of the suggested replies appears in the Auto Suggestions pane, so you can choose the appropriate reply. After you choose a reply, you can edit your e-mail response before sending it.

You can ignore the suggested replies and use the new Agent Desktop Auto Suggestions pane to search for a more appropriate reply. You can search for automatic suggestions across all categories or within a specific category with the use of a keyword. To contribute towards the overall intelligence of the solution, you can create new suggested replies for the customer.

Suggested replies for e-mail messages are ranked in order of usefulness and frequency of use. If you use the suggested reply, the ranking counter increments and the reply moves higher in the suggestion list. If you edit the suggested reply, the rank remains the same.

New usage modes

Agents can choose one of the following usage modes depending on their location, phone, and network:

Note: The new usage modes are available only in Avaya Aura™ Agent Desktop Release 6.1.

- **Desk Phone**: The Desk Phone mode allows agents to use the office phone in a contact center environment. Agents can use the Desk Phone mode when they are at the contact center and want to share control between the office phone and the computer. While in Desk Phone mode, agents access audio components from the office phone and visual components from the computer. The Desk Phone mode is available if you are using Contact Center with Avaya Communication Server 1000 or Avaya Aura™ Unified Communications platform.
- **My Computer**: The My Computer mode (softphone) allows agents who are on the move and want to access the telephone switch through the Internet to establish a voice connection over a Voice over Internet Protocol (VoIP)

network. You can make or receive voice calls through Agent Desktop using a headset connected to your computer.The My Computer mode provides the best IP audio quality that is possible with your connection speeds, computer performance, and network setup. The My Computer mode is available if you are using Contact Center with Avaya Aura™ Unified Communications platform.

Web communications improvements

Agents using the Web communications feature to communicate directly with customers in real time over the Internet, can now transfer or conference a chat session.

Note: The Web communications improvements are available only in Avaya Aura™ Agent Desktop Release 6.1.

Other changes

See the following sections for information about changes that are not feature-related:

- Windows 7 support (page 10)

Windows 7 support

Agent Desktop is now supported on the Microsoft Windows 7 operating system.

Introduction

Avaya Aura™ Agent Desktop is a single-interface client application used to interact with customers. You can respond to customer contacts through a variety of media, including phone, outbound contacts, e-mail, Web communication, instant messaging, fax, scanned documents and SMS text messages. Agent Desktop provides automation for customer responses to eliminate repetitive actions, such as typing a common response in an e-mail message.

Agent Desktop supports the following contact types:

- Voice contacts
- E-mail messages
- Outbound contacts
- Web communications contacts
- Instant Messages
- SMS text messages
- Fax messages
- Scanned documents
- Voice mail messages

Your administrator determines which type of contacts you can handle.

Agent Desktop uses Microsoft .NET Framework 3.5 Click Once Deployment technology, which means that you can install and start the application by entering a URL address in Windows Explorer or Internet Explorer.

Prerequisites

- Ensure that you review the Contact Center installation procedures.
- Supported Operating Systems:
  - Windows XP Professional SP2 or later
  - Windows Vista SP2 or later
  - Windows 7
- Ensure that the following are installed on the client machine:
  - Microsoft Internet Explorer 7.0 or later
  - Microsoft .NET Framework 3.5
  - Windows Installer 3.1 Redistributable (v2)
  - Microsoft Visual C++ 2005 SP1 Redistributable Package (x86)

Navigation

- Agent Desktop User Interface (page 13)
- Using your Agent Desktop (page 19)
- Telephony (page 29)
- Outbound calls and callbacks (page 39)
- E-mail (page 65)
- Fax message (page 81)
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- Voice mail messages (page 89)
- Short Message Service text message (page 93)
- Web communications (page 99)
- Agent Statistics (page 117)
- Instant messaging (page 107)
- Customer and contact details (page 121)

Agent Desktop User Interface

Use Agent Desktop to handle voice, e-mail, outbound, Web communications, instant messaging, voice mail, fax, scanned documents, and SMS text message contacts. Use Agent Desktop in the following situations:

- to handle voice contacts when Agent Desktop is installed on a Communication Control Toolkit server
- to handle voice contacts, outbound contacts (voice calls from you to customers), e-mail messages, or Web communications contacts when Agent Desktop is installed on a Contact Center Multimedia server
- to work with the Microsoft Office Communications Server to handle voice and instant messaging in a SIP-enabled contact center

This chapter describes the main user interface of the Agent Desktop application. There are three main sections to the Agent Desktop user interface:

Example of Agent Desktop layout

1	Top bar (page 14)
2	Work list window (page 15)
3	Action bar (page 16)

The Agent Desktop also provides other controls and menus that are explained in the following chapters.

Navigation

- Work item paradigm (page 14)
- Top bar (page 14)
- Work list window (page 15)
- Action bar (page 16)
- User preferences (page 17)

Work item paradigm

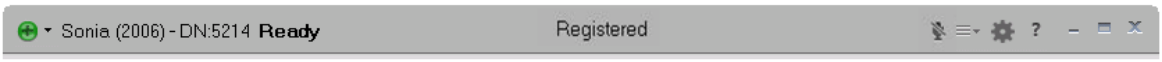
The main Agent Desktop user interface is based on a work item paradigm. Each agent-to-customer interaction is a work item. Work items appear on the Agent Desktop work list. If you perform another interaction associated with that work item (for example, an IM consultation with an expert), then that interaction is displayed as part of the original work item.

The work list consists of work items and control buttons corresponding to the work item. The controls and functions change depending on the work list window behavior. When a new contact arrives, Agent Desktop adds the new contact as a work item to the work list.

Top bar

The Top bar appears at the top of the Agent Desktop window. The Top bar provides the system status and main controls to operate Agent Desktop.

Example of Top bar layout



The agent status icon appears on the top left corner of the Agent Desktop Top bar. It shows the agent status, agent name, agent login ID, and agent dialable number.

The Top bar has the following icons:

Top bar icons

Icon	Name	Description
	Mute / Unmute	Place the call on mute while using the computer (softphone) to place and receive calls. Use the same button to unmute.
	Terminal action	Access Emergency, Observe and Intrinsics controls
	User preferences	Access user preferences and change audio settings for the softphone.
	Agent status	Select agent status
	Help	Access help information

Use the Terminal Action menu to perform the following tasks:

Terminal Action Menu

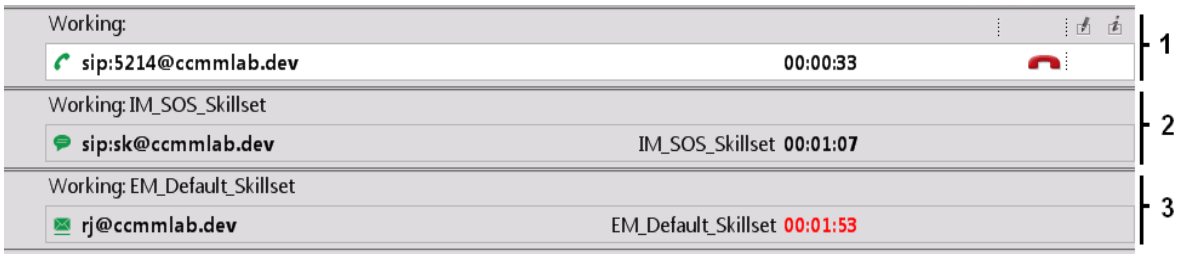
Command	Description
Observe	Used by supervisors or agent-supervisors to listen in on a contact.
Emergency	Immediately connect with your supervisor in case of emergency. SIP-enabled contact center does not support this feature.

Work list window

The work list window contains work items and control buttons corresponding to the work item. The controls and functions change depending on the information in the work list window. The top right corner of the work list window has work item controls. These controls are common to all work items on the work list. When a new contact arrives, Agent Desktop adds the new contact as a work item to the work list.

The following figure shows the work list windows and controls.

Example of work list layout



The illustrated work list shows three work items:

1	A voice call work item, at the top of the work list.
2	An Instant Message (IM) work item, in the middle of the work list.
3	An e-mail work item, at the bottom of the work list. The e-mail is on hold.

- A work item is a collection of interactions with a customer, another agent, a supervisor, or an expert.
- A work list is a collection of work items. When you receive a new contact, it is added to the work list so that you can monitor your current contacts. When you finish with the contact, or reject the contact, the work item is removed from the list.

Work item controls

Each work item has a number of contact-related controls. These controls change depending on the work list window behavior and contact type.

Examples of work item controls

Voice	IM	E-mail	Name	Description
			Accept	Accept the work item.
			Release	Release or reject the work item.
			Hold	Place the work item on hold.
			Transfer	Transfer the work item contact.
			Conference	Conference the work item.
			Activity code	Set the work item activity code.
			Work item details	Read work items details.

Only appropriate controls are displayed on work items. Voice-related controls are displayed on a voice work item. IM related controls are displayed on IM work item.

Action bar

The Action bar contains global controls to create a new work item, to search contacts, and to open secondary windows. The Action bar stays at the bottom of the Agent Desktop window and remains at the bottom as the window expands.

Example of Action bar layout

Use the Action bar at the bottom of the main interface to make new contacts. New voice, IM, or e-mail contacts are collectively called new work in the Work Item Paradigm.

Action bar commands

Icon	Name	Description
	Customer Details	View customer details.
	Contact Presence	Contact presence.
	Initiate Contact	Start a new work item.
	Call Supervisor	Call your supervisor.
	DTMF	Generate DTMF tones.

Action bar commands

Icon	Name	Description
	Contact Search	Search for contacts.
	Customer Search	Search for customers.
	Schedule Callback	Schedule callback.
	Agent Statistics	Display agent statistics scroll bar.

User preferences

Use the **User Settings** page, under the User Preferences menu, to select template locations, enable the spelling checker, define an e-mail signature, or change your password.

Use the **Audio Settings** page, under the User Preferences menu, to adjust playback and record volume and select playback and record devices, while using the computer (softphone) to place and receive calls.

Using your Agent Desktop

This chapter describes how to install and configure Avaya Aura™ Agent Desktop.

Navigation

- Installing the Agent Desktop (page 19)
- Starting the Agent Desktop (page 20)
- Creating a shortcut to the Agent Desktop (page 21)
- Logging on to Agent Desktop when using a desktop phone (page 21)
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- Changing your status to Not Ready (page 27)
- Accessing online help (page 27)
- Logging off from Agent Desktop (page 28)

Installing the Agent Desktop

Install the Agent Desktop if you are starting the application for the first time or if you are starting the application following installation of an upgrade or a patch.

Prerequisites

- Ensure that the administrator has configured your Windows User ID in Communication Control Toolkit (CCT) and that you have a valid user ID, password, and domain to use with Agent Desktop.

Procedure steps

Step	Action
1	In Windows Explorer or Internet Explorer, type the HTTP address (URL) provided by your system administrator. The URL format is <Contact Center Multimedia servername>/agentdesktop. If you do not use Multimedia

functionality then the URL is <Communication Control Toolkit servername>/agentdesktop.

2 Click **Launch** Agent Desktop**.**

3 Click **Install**.

--End--

Starting the Agent Desktop

Start the Agent Desktop when you are ready to open the application.

Prerequisites

- Ensure that you install Agent Desktop. See Installing the Agent Desktop (page 19).
- Ensure that the administrator configured your Windows User ID in Communication Control Toolkit (CCT) and that you have a valid user ID, password, and domain for use with Agent Desktop.

Procedure steps

Step	Action
1	In Windows Explorer or Internet Explorer, enter the HTTP address (URL) provided by your system administrator. The URL format is <Contact Center Multimedia servername>/agentdesktop.
2	Click **Launch** Agent Desktop. OR Click **Start**, **All Programs**, **Avaya**, Agent Desktop. *The Agent Desktop toolbar appears. If a CCT Connection Failure message appears stating the automatic login to CCT using your Windows logon identity failed, your Windows User ID is not configured on CCT. Click Retry to enter valid User Credentials or click Cancel to exit the application.*

--End--

Procedure job aid

If you log on to the Agent Desktop to handle Predictive Outbound contacts, a delay can occur before you can log on to the required applications. If the delay occurs after the agent logs on to Contact Center Manager Server or Contact Center Multimedia, and before logging on to the Predictive Outbound skillset, ensure that CPSEE Application server name is in the hosts file of the client machine.

Creating a shortcut to the Agent Desktop

Create a shortcut to the Agent Desktop to quickly access the application without manually entering the URL.

Prerequisites

- Ensure that you install Agent Desktop. See Installing the Agent Desktop (page 19).

Procedure steps

Step	Action
1	Click **Start, All Programs, Avaya**.
2	Right-click Agent Desktop.
3	Select **Send To, Desktop (create shortcut)**.

--End--

Logging on to Agent Desktop when using a desktop phone

Log on to the Agent Desktop after you start the Agent Desktop application. While you log on, you can choose between a desktop phone and a softphone based on your usage mode. The system automatically configures your status to Not Ready. Change your status to Ready to indicate that you are available to handle all media types for which you are licensed and configured. If you are assigned to a skillset for a particular contact type, you can receive and create contacts in that contact type.

Procedure steps

Step	Action
1	Start the Agent Desktop.
2	If you have Hot Desking enabled, type your workstation name at the prompt.
3	On the Agent Desktop Top bar, from the **Status** list, select **Login**.
4	Click the **Telephony** tab.
5	Select **Desktop Phone** from the **Place and receive calls using** drop-down list. *A logon prompt does not appear. Your logon ID is automatically filled in based on the Communication Control Toolkit implementation for your contact center.*

The system verifies your logon ID and automatically logs you on to the Agent Desktop application.

6 If you are configured to handle Multimedia contacts (such as e-mail), in the **Multimedia** tab, type your **ID** and **Password**.

7 Click **Login**.

The status icon changes to Not Ready.

--End--

Variable definitions

Description	Value
ID (Multimedia)	Your logon ID appears in the ID box, based on your Communication Control Toolkit configuration.
Password (Multimedia)	Initially, for multimedia agents, your password is the same as your Agent Logon ID. You must change your password using the steps in Changing your password (page 24). The system verifies your password and logs you on to the Agent Desktop application. The Logged Out button changes to Logged In.

Logging on to Agent Desktop when using the softphone

Log on to the Agent Desktop after you start the Agent Desktop application. While you log on, you can choose between a desktop phone and a softphone based on your usage mode. The system automatically configures your status to Not Ready. Change your status to Ready to indicate that you are available to handle all media types for which you are licensed and configured. If you are assigned to a skillset for a particular contact type, you can receive and create contacts in that contact type. Softphone login is available only in Avaya Aura™ Agent Desktop Release 6.1.

Procedure steps

Step	Action
1	Start the Agent Desktop.
2	If you have Hot Desking enabled, type your workstation name at the prompt.
3	On the Agent Desktop Top bar, from the **Status** list, select **Login**.
4	Click the **Telephony** tab.
5	Select **My Computer** from the **Place and receive calls using** drop-down list.
6	If your user profile is saved locally on the PC running Agent Desktop, click **Load saved profile**.

7 If you create a new user profile, enter your **Extension**, **Password**, **Server Address** and **License Type** and then click **Save this profile**.

8 If you are configured to handle Multimedia contacts (such as e-mail), in the **Multimedia** tab, type your **ID** and **Password**.

9 Click **Login**.

The status icon changes to Not Ready and a My Computer (softphone) Registered message appears on the Top Bar of the Agent Desktop. The Registered message means that you can now place and receive calls using your computer (softphone). Call control on the computer (softphone) is exactly the same as using a desktop phone.

--End--

Variable definitions

Description	Value
Extension	The extension number appears in the Extension box, based on your configuration.
Password	The password for the extension.
Server Address	The server address of the telephony switch.
License Type	The Contact Center license type.
ID (Multimedia)	Your logon ID appears in the ID box, based on your Communication Control Toolkit configuration.
Password (Multimedia)	Initially, for multimedia agents, your password is the same as your Agent Logon ID. You must change your password using the steps in Changing your password (page 24). The system verifies your password and logs you on to the Agent Desktop application. The Logged Out button changes to Logged In.

Logging on to Agent Desktop of a SIP-enabled contact center

Log on to the Agent Desktop after you start the Agent Desktop application. When you log on, the system automatically configures your status to Not Ready. Change your status to Ready to indicate that you are available to handle all media types for which you are licensed. If you are assigned to a skillset for a particular contact type, you can receive and create contacts in that contact type.

Procedure steps

Step	Action
1	Start the Agent Desktop.
2	On the Agent Desktop Top bar, from the Status list, select **Logged Out**.

3 In the **Enter Login details** window, perform one of the following tasks:

- If your user profile is configured in Office Communicator (OC) and OC is installed on the PC running Agent Desktop, ensure that the information in the **Sign-in name**, **Password**, **Domain**, **Uri**, and **Server name or IP** fields is correct.
- If your user profile is saved locally on the PC running Agent Desktop, click **Load saved profile**.
- If you create a new user profile, enter your **Sign-in name**, **Password**, **Domain**, **Uri**, and **Server name or IP**, and then click **Save this profile**.

4 Click **OK**.

5 If an OC client runs on the PC running Agent Desktop, a warning message appears. Click **Yes** to close the OC client.

--End--

Variable definitions

Description	Value
Sign-in name	User name (for example, agent5001).
Password	Password.
Domain	The Windows domain in which the user name and password are configured in Active Directory.
Uri	The SIP URI of the Windows user (for example, sip:AgentID@mydomain.com or Username@company.com).
Server name or IP	The Fully Qualified Domain Name (FQDN) of the Office Communications Server (OCS) in the Domain (for example, OCS_Server.mydomain.com).

Changing your password

Change your password from the default password if you are an agent who handles multimedia contacts. The default password is the same as your Agent Logon ID.

If you forget your password, contact your administrator who can reset your password on the Contact Center Multimedia server.

Procedure steps

Step **Action**

1 On the Agent Desktop Top bar menu, click **User Preferences**.

2 Select the **Preferences** tab.

3 Near the bottom of the **Preferences** tab, in the **Password** section, select **Change Password**.

4 In the **Current Password** box, type your current password.

5 In the **New Password** box, type your new password. Your new password cannot be the same as your Agent Logon ID.

6 In the **Confirm Password** box, retype your new password.

7 Click **Save**.

--End--

Muting and unmuting when using the softphone

Use the mute function when you want to prevent other parties from listening to your conversation or to avoid the background noise during an active call.

Note: The mute function is available only for the My Computer mode.

Procedure steps

Step	Action
1	On an active call or during conference, perform any one of the following actions: • To mute the call, in the Top bar, click **Mute**. *The Mute button changes to Unmute, and other listeners can no longer hear any background noise.* • To mute the call, in the Top bar, click **Unmute**. *The Unmute button changes to Mute, and the callers can hear you speaking.*

--End--

Changing the audio settings for softphone

You can adjust the audio settings for playback and record if you are using your computer (softphone) to place and receive calls.

Procedure steps

Step	Action

1. On the Agent Desktop Top bar menu, click **User Preferences, Audio Settings**.
2. In the **Audio Settings** tab, in the **Volume** section, adjust the **Playback** slider to set the volume for all sound output through your computer speakers or headphones.
3. Select the **Mute** check box below the **Playback** slider to eliminate any sound output through your computer speakers or headphones.
4. Adjust the **Record** slider to set the recording volume of all sound transmitted through a microphone to your computer.
5. Select the **Mute** check box below the **Record** slider to eliminate any sound being sent to your computer through the microphone.

--End--

Configuring the audio devices for softphone

You can configure the audio playback and recording hardware if you are using your computer (softphone) to place and receive calls.

Procedure steps

Step	Action
1	On the Agent Desktop Top bar menu, click **User Preferences, Audio Settings**.
2	In the **Audio Settings** tab, in the **Audio Devices** section, select the audio playback hardware on your local system from the **Playback Device** list.
3	Select the audio record hardware on your local system from the **Record Device** list.

--End--

Changing your status to Ready

Change your status to Ready when you are available to create or receive contacts.

When you change your status to Ready in a SIP-enabled Contact Center, your Contacts Presence status automatically changes to Available.

Procedure steps

Step	Action

1 On the Agent Desktop Top bar menu, click the Status icon.

2 Select **Go Ready**.

Agent Desktop places you in Ready status. The status icon changes to green and the Top bar displays the Ready status.

--End--

Changing your status to Not Ready

Change your status to Not Ready when you can create new contacts, but cannot receive them. If your administrator configured Not Ready reasons, you can select a reason when you change your status to Not Ready.

When you change your status to Not Ready in a SIP-enabled contact center, your Contacts Presence status automatically changes to Do Not Disturb.

Your supervisor or administrator provides the activity codes for the Not Ready reasons. The activity codes defined in Contact Center Manager Server appear in the Agent Desktop list. Alphanumeric codes are available.

Procedure steps

Step	Action
1	On the Agent Desktop Top bar menu, click the Status icon.
2	Click **Go Not Ready**.

Agent Desktop places you in Not Ready status. The status icon changes to orange and the Top bar displays the Not Ready status.

--End--

Accessing online help

Access online help when you need immediate help to perform tasks. Agent Desktop includes online help for both agents and supervisors.

Note: Pressing the F1 key will display the online help.

Procedure steps

Step	Action
1	On the Agent Desktop Top bar menu, click the Help icon, click **Show Help**.

--End--

Logging off from Agent Desktop

Log off from Agent Desktop when you are ready to exit the application.

A warning message appears asking you to confirm that you want to close the Agent Desktop and log off.

Prerequisites

Ensure that you do not have a contact open. If a contact is open, you must close the contacts before you log off of the application.

Procedure steps

Step	Action
1	On the Agent Desktop Top bar menu, click the Status icon.
2	Click **Log Out**.
	Agent Desktop logs you off. The status icon changes to red and the Top bar displays the Logged Out status.

--End--

Telephony

This chapter describes how to handle incoming telephone calls from customers by using Avaya Aura™ Agent Desktop.

You can use the Agent Desktop to perform the following telephony tasks:

- Accept and decline incoming contacts.
- Enter an activity code.
- Place and release a call on hold.
- Transfer a call to another party.
- Conference a call.
- Make a call.
- End a call.
- Call a supervisor.
- Handle an emergency.

Although you can use your phone to perform certain tasks, Avaya recommends that you use Agent Desktop to perform all telephony tasks, such as logging on or off, changing your ready status, accepting or rejecting a call, placing a customer on hold, transferring a customer, calling a supervisor, and releasing a call.

In a SIP-enabled contact center there are some telephony tasks that are not available on the agent phones. You must perform the following telephony tasks using Agent Desktop:

- Enter Activity codes
- Call a supervisor
- Observe a call (Supervisor only)
- Barge-In on a call (Supervisor only)

You can perform all other telephony tasks using Agent Desktop, or the phone. These tasks are:

- Accept and decline incoming contacts
- Place and release a call on hold
- Transfer a call to another party
- Conference a call
- Make a call
- End a call

- Enter DTMF Digits

Navigation

- Accepting a call (page 30)
- Declining a call (page 31)
- Entering an activity code (page 31)
- Placing a call on hold (page 32)
- Releasing a call on hold (page 32)
- Transferring a call (page 33)
- Conferencing in another agent (page 33)
- Conferencing in a supervisor (page 34)
- Ending a call (page 34)
- Calling your supervisor (page 34)
- Making a call (page 35)
- Using DTMF digits (page 35)
- Using the Emergency key (page 36)
- Observing a call (page 36)
- Ending your observation (page 38)
- Barging in on a call (page 37)

Accepting a call

Accept and work with telephone calls. The relevant work item controls become active and the call timer appears in the work item.

If your administrator configured your contact center to run in Force Call mode, you must handle all contacts presented to you.

Prerequisites

- Ensure that you are in Ready state.
- Ensure that you have a skillset designated to handle telephone calls.

Procedure steps

Step	Action
1	On the Agent Desktop, select the new alerting work item and click the **Accept** work item control.

--End--

Declining a call

Decline a call if you want to reject the contact and place the contact back in the queue. The contact is then queued to another agent and your status becomes Not Ready. You cannot receive new incoming contacts until you change your status to Ready.

Prerequisites

- Ensure that you are in Ready state.
- Ensure that you have a skillset designated to handle telephone calls.

Procedure steps

Step	Action
1	On the Agent Desktop, select the new work item and click **Reject**.

--End--

Entering an activity code

Enter one or more activity codes during your calls by using the Agent Desktop Top work item activity in-line command. Activity codes provide a method to track the time that agents spend on various types of calls. For example, you can use an activity code to track sales calls by entering that activity code in the Agent Desktop during sales-related calls.

Activity codes are also used to enter Not Ready reasons. You can select Activity Codes when you are handling a contact. You can select Not Ready codes when your status is Not Ready.

Your supervisor or system administrator provides activity codes. You can use alphanumeric codes. Activity codes that are defined in Contact Center Manager Server appear on the Agent Desktop list. If a new activity code is added while you are logged on to the Agent Desktop, you must log off the Agent Desktop and log on again before you can select the new code from the list.

The Activity Code box appears on the Work Item, based on your contact center configuration. If you launch Agent Desktop from the Contact Center Multimedia server the Activity Code box will be populated with default values, otherwise you must enter the Activity Codes your Administrator or Supervisor gives you.

Procedure steps

Step	Action
1	Select the work item.
2	Click the Activity Code work item in-line command.
3	In the **Activity Code** box, select or type your Activity Code.

--End--

Placing a call on hold

Place a call on hold to interrupt your current call. When you want to speak to the caller again, release the call from hold.

The contact timer on the work item changes to orange characters while the work item is on hold.

Procedure steps

Step	Action
1	On the work item, click **Hold**.

--End--

Releasing a call on hold

Release a call that you placed on hold when you want to speak to the caller again.

Procedure steps

Step	Action
1	On the work item, click **Unhold**. *The call is taken off hold, the status bar color changes to green.*

--End--

Transferring a call

You can transfer a call to another agent using a supervised transfer or a blind transfer. In a supervised transfer, the call is placed on hold, and you speak to the third party before you complete the transfer. In a blind transfer, which is the default option, you transfer the call without speaking to the third party.

Attention: The blind transfer option on Agent Desktop toolbar is greyed out in a SIP-enabled contact center. However you can complete the transfer before the third party answers the call (perform a blind transfer) using the steps in this procedure.

Attention: If you are transferring a call to a voice mail system, you must ensure that the correct DTMF tones are transferred to the voice mail system.

Procedure steps

Step	Action
1	On the work item, click **Transfer**.
2	In the **Transfer** window, **Supervised Transfer** is automatically selected.
3	In the **Number to Transfer** box, type the number to which you want to transfer the call. *The active call is placed on hold and a call is placed to the third party. While you speak with the third party, the Transfer and Hold buttons on the phone both flash to indicate that you have a customer on hold and that you must complete the transfer.*
4	Before the third party answers the call, click **OK**. *The call is transferred to the third party and is dropped from your phone.*

--End--

Conferencing in another agent

Conference in another agent if you want to speak to your customer and another agent.

Procedure steps

Step	Action
1	On the work item, click **Conference** to place the customer on hold and open the Conference window.
2	In the Conference window, in the **Number** box, type the number of the agent to conference into the call.
3	Click **OK** to begin the conference.

4 Speak with the agent, if necessary, before you conference in the customer.

5 Click **Conference** again to take the customer off hold and conference in the customer and the other agent.

--End--

Conferencing in a supervisor

Conference in a supervisor if you want to speak to your customer and your supervisor.

Procedure steps

Step	Action
1	On the Agent Desktop Action bar menu, click **Supervisor** to place the customer on hold and conference in your supervisor.
2	Speak to your supervisor, if necessary, before you conference in the customer.
3	Click **Conference** again to take the customer off hold and conference in the customer and your supervisor.

--End--

Ending a call

End a call when a call is completed. If you were in Ready status before the call, you automatically return to Ready when you terminate the call. If you require time to perform call wrap-up tasks before you accept another call, change your status to Not Ready and enter a Not Ready Reason Code in the Code field of the Top bar. Not Ready Reason codes are defined by the administrator.

Procedure steps

Step	Action
1	On the work item, click **Release**.

--End--

Calling your supervisor

You can call your supervisor if you are not currently handling a call.

To call a supervisor when you are on a call, see Conferencing in a supervisor (page 34).

Procedure steps

Step	Action
1	On the Agent Desktop Action bar menu, click **Supervisor**.

--End--

Making a call

Make a call using Agent Desktop. Ensure that you follow the steps based on the type of phone number you want to call:

- the default phone number
- a new external phone number
- a new internal phone number

Procedure steps

Step	Action
1	On the Agent Desktop Action bar menu, click **Initiate Call**.
2	In the text box to the left of **Initiate Call**, enter the phone number to dial.
3	Click **Initiate Call** again. *The phone number is dialed. A new work item is added to the work list and the call timer on the work items starts to increment.*
4	Click **Release** when you complete the call.
5	If required by your supervisor, enter an activity code in the **Activity Code** box, and then press **Enter**.

--End--

Using DTMF digits

Use the Dual-tone Multifrequency feature (DTMF) if, during a call, you must navigate through a contact center menu or dial numbers to access voice messages.

Procedure steps

Step	Action

1 On the Agent Desktop Action bar menu toolbar, click the **DTMF** option.

2 Enter the numbers on the keypad that appears.

--End--

Using the Emergency key

Use the Emergency key if you require immediate assistance from your supervisor while handling a call. For example, if you talk to a customer who suddenly threatens you, you may want to add your supervisor to the call immediately. The caller is not placed on hold when the supervisor is conferenced in an emergency.

Attention: Emergency key is not supported in SIP-enabled contact centers.

Procedure steps

Step	Action
1	On the Agent Desktop Top bar menu, click **Emergency**. *Your supervisor is added to the call immediately and conferenced in with both you and the customer.*

--End--

Observing a call

Observe a call when a supervisor or agent-supervisor wants to listen in on a call. In a SIP-enabled contact center, both the observe and barge-in functions can be used to listen in on a call. When using the observe function, the supervisor or agent-supervisor can listen to a call without being heard. When using the barge-in function, the supervisor or agent-supervisor can participate in a call between the agent and the customer.

The agent or customer on the call cannot hear the supervisor join or leave the call. The supervisor or agent-supervisor actions do not affect the original call or the normal connect and disconnect actions of the agent and customer conversation.

An agent-supervisor can handle calls and be a supervisor to other agents. Only one supervisor at a time can observe a call, and the supervisor can observe only one call at a time.

Prerequisites

- Ensure that your contact center is SIP-enabled.
- Ensure that you log on to Agent Desktop.
- Ensure that you have either supervisor or agent-supervisor privileges.

Procedure steps

Step	Action
1	On the Agent Desktop Top bar menu, click **Observe**. *In the Assigned Agents box, the green circle indicates the assigned agents that are ready to receive calls, and the red circle indicates the assigned agents that are not ready to receive calls.*
2	In the **Supervisor Control** dialog box, under **Current Agent Contacts**, select the call that you want to observe.
3	Click **Observe**. *A new call is presented on the Agent Desktop of the supervisor. The new call is not a Contact Center call, so the agent does not need to be ready. The call connects the supervisor or agent-supervisor to the selected Agent call.*
4	Accept the call ringing on your Agent Desktop.

--End--

Barging in on a call

Barge in on a call if you are observing a call that needs immediate supervisor attention. When using the barge-in function, the supervisor or agent-supervisor can participate in a call between the agent and the customer.

The agent or customer on the call cannot hear the supervisor join or leave the call. The supervisor or agent-supervisor actions do not affect the original call or the normal connect and disconnect actions of the agent and customer conversation.

Procedure steps

Step	Action
1	In the **Supervisor Control** dialog box, click **Barge-In**.

--End--

Ending your observation

End your observation when you no longer need to observe the agent and customer conversation. The agent and the customer on the call cannot hear the supervisor join or leave the call. The supervisor or agent-supervisor actions do not affect the original call or the normal connect and disconnect actions of the agent and customer conversation.

Procedure steps

Step	Action
1	On the work item, click **Release**.

--End--

Outbound calls and callbacks

This chapter describes how to handle outbound calls and callbacks by using Avaya Aura™ Agent Desktop.

The campaign administrator creates Outbound campaigns. When a campaign runs, the system pushes outbound contacts to your desktop in the same way that the system presents voice or multimedia contacts. When you accept an outbound contact, you are actively working on a call.

When you accept an outbound contact, the Agent Desktop displays the customer information and any other information related to the campaign. Some campaigns include a script for you to follow during the call.

If the campaign administrator selects manual agent dial, you can call the customer after you review the customer and campaign information. If the campaign administrator selects autodial, the system automatically places the call for you after a defined number of seconds.

You use the Agent Desktop interface to handle an outbound call:

- Accept the incoming contact.
- Review and update customer information.
- Follow a script.
- Assign a disposition code.

You can also use the Agent Desktop to create a callback. Both customers and agents can create scheduled callbacks. If your Contact Center is licensed for Web communications, a customer can request a call from an agent through a Customer Interface Web site. From the Web site, the customer can specify the reason they are requesting the callback, as well as a date and time for the call.

An agent can schedule a callback to a customer using the Schedule Callback button. The Schedule Callback feature is available only if your Contact Center is licensed for outbound contacts. However, a scheduled callback is not associated with an outbound campaign.

At the specified date and time, Agent Desktop presents the contact to an agent with the appropriate skillsets. To perform a callback, an agent must be assigned a skillset to handle outbound contacts.

Navigation

- Accepting an outbound contact (page 40)
- Declining an outbound contact (page 41)

- Placing an outbound call (page 41)
- Using a script (page 42)
- Recording the result (page 42)
- Ending the call (page 43)
- Scheduling a callback (page 43)
- Calling the customer (page 44)

Accepting an outbound contact

Use the Agent Desktop interface to accept and handle outbound campaigns one call at a time.

Your outbound administrator can configure the outbound calls to be made immediately after you accept a call, specify a number of seconds before the call is placed, or enable the agent to make the call.

By using the Contact Center Manager Administration, an administrator can configure the Agent Desktop to give visual and audible alerts when a contact is presented. For more information about these features, see *Avaya Aura™ Contact Center Server Administration* (NN44400-610).

Prerequisites

- Ensure that you are in Ready state.
- Ensure that you have a skillset to handle outbound contacts.

Procedure steps

Step	Action
1	On the Agent Desktop work item, click **Accept**. *When you accept an incoming contact, you connect to the customer. The Agent Desktop expands to show the customer details and the defined script for the call, the call is dialed according to the settings in the outbound campaign, and the call timer appears on the status bar.*

--End--

Declining an outbound contact

You can decline an outbound contact if you are unavailable to accept a call. Change your status to Not Ready if you are unavailable to handle contacts.

Procedure steps

Step	Action
1	On theAgent Desktop work item, click **Reject.**

--End--

Placing an outbound call

Place an outbound call by accepting or opening an outbound contact. You can then review the customer details and outbound contact script. Your outbound administrator can configure the outbound calls to be made immediately after you accept a call, or specify a number of seconds before the call is placed.

After you accept or open an outbound contact, you can call the customer and perform the following tasks:

- Verify customer information. After you successfully place the call, confirm that you have reached the correct customer by reviewing the contact information with the customer.
- Follow the script or complete the questionnaire, if applicable.
- Complete the call and assign a disposition code, schedule a callback if required, enter any applicable notes, and save the call results.

Prerequisites

- Understand how to use a script.
- Understand how to record the result of a call.

Procedure steps

Step	Action
1	On the Agent Desktop Action bar menu, click **Initiate**.
2	In the **Enter Destination** window, click **OK** to dial the default customer telephone number.
3	If you can speak with the customer, proceed with the call by using a script, if applicable.
4	If you cannot speak with the customer, record the result of the call to update the contact with the appropriate disposition code, reschedule the call, and add any applicable notes.

5 Verify the customer information and update any customer contact fields required.

--End--

Using a script

Use a script if the campaign administrator assigned an agent script to the outbound campaign. The content of your script depends on the campaign. The script can contain an introduction, a conclusion, and a number of questions or suggested phrases. As you progress through the script with the customer, you can record your answers or comments directly on the Script Questions tab. The customer responses are saved automatically.

Attention: If the campaign administrator did not assign an agent script to the outbound campaign, the Script Questions tab does not appear.

Procedure steps

Step	Action
1	On the Agent Desktop, click the **Script Questions** tab.
2	Read the introduction to the customer.
3	Read each question in the script to the customer.
4	Record the customer responses by using one of the three methods defined on the **Script Questions** tab (the customer responses are saved automatically): • Select an option from the list. Depending on the outbound campaign, you can read the options to your customer to select the appropriate response. • Select an option. • Type the customer comments in a text box.
5	To disconnect from the call, click **Release**.

--End--

Recording the result

Record the result of a call by selecting a disposition code at the end of each outbound call. The campaign administrator defines disposition codes to use for each campaign. The disposition codes can be different in every campaign.

Some disposition codes indicate that the call was completed (for example, Not Interested or Sale Made), while other disposition codes indicate that the call was not completed (for example, No Answer or Number Busy). If the call was not completed, or the customer requested a callback, you can schedule a callback.

Procedure steps

Step	Action
1	Click the **Disposition codes** tab.
2	Select the disposition code that most accurately reflects the result of your call.

--End--

Ending the call

End the call after you verify the customer details, answer all of the questions in the script, and record a disposition code.

If the disposition code is configured to do so, the script questions and answers are saved in the multimedia database. Contact your supervisor or administrator for more information about which disposition codes to select.

If the call is incomplete, or the customer requests a callback, you can schedule a callback.

Procedure steps

Step	Action
1	Click **Finish**.

--End--

Scheduling a callback

Schedule a callback if you made a call from your desktop and the customer was not available. You can also schedule a callback in response to an e-mail message or telephone request from a customer. A scheduled callback outbound contact is not pegged against an outbound campaign.

Prerequisites

- Ensure that you are not working on another contact.
- Ensure that your telephony toolbar is open.

- Identify a customer for a scheduled callback.

Procedure steps

Step	Action
1	Click **Schedule Callback**.
2	In the **Schedule Callback** window, select a skillset from the list to direct the contact to the most appropriate agent skills.
3	Select either an active agent for the call, or choose a specific agent from a list of all agents.
4	In the **Subject** box, type a subject for the callback.
5	In the **Time** box, select the time to perform the callback.
6	In the **Date** box, select the date to perform the callback.
7	In the **Reason** box, type additional information about the contact or the customer. Only agents and supervisors can view the information in the **Reason** box.
8	Click **Send**. *The scheduled callback is entered into the database, ready to be routed when the selected date and time occurs.*

--End--

Calling the customer

Call a customer when you need to manually place a call. With an outbound campaign contact, your administrator can configure the call to be automatically dialed when you accept the contact. A scheduled callback contact cannot be configured to be dialed automatically. You must manually place the call after you review the contact information.

Prerequisites

- Ensure that you are assigned to an outbound skillset.

Procedure steps

Step	Action
1	When the contact is presented to your desktop, click **Accept**.
2	On the Agent Desktop Action bar menu, click **Originate Call** to dial the default customer telephone number as displayed in the text box to the left of the **Originate Call** button.
3	In the Enter Destination dialog box, click **OK** to dial the default customer telephone number.

4 When you complete the call, click **Release**.

5 If required by your supervisor, enter an activity code in the **Activity Code** box, and then press **Enter**.

--End--

Predictive Outbound

This chapter describes how to handle Predictive Outbound contacts by using Avaya Aura™ Agent Desktop.

Administrators create Outbound campaigns using the customer database, custom scripts, and Predictive Outbound settings that determine how calls are presented to agents with Predictive skillsets. Based on how the Administrator configures the campaign, calls can be dialed by the system or by the agent and presented to the agent automatically or with time for the agent to preview the contact.

The Predictive Outbound feature requires additional hardware and software.

You can use the Predictive Outbound features to perform the following telephone tasks:

- Accept incoming contacts.
- Cancel incoming contacts.
- Place a call on hold.
- Transfer a call to another party.
- Transfer a contact to another agent, skillset or work session.
- Conference a contact (call and data).
- End a contact (call and data).
- Schedule a callback.

There are five dialing options in Predictive Outbound for delivering contacts to the Agent Desktop. The dialing option used is determined by the Administrator during configuration of the campaign that is routing the contact to the Agent Desktop. The five dialing options are as follows:

- Predictive: Contact Center sends a record to the dialer for automatic outbound processing. The contact is displayed on the Agent Desktop and the customer simultaneously receives the call. The agent cannot cancel the contact or dial the number.
- Paced: Contact Center presents a record to the agent for review while the customer is being dialed. The agent cannot cancel the contact or dial the number.
- Preview: Contact Center presents a record to the agent for review. After a configured period of time passes, the system dials the default number for the customer. Before this period of time passes, the agent can cancel the contact or manually dial the number.

- Progressive: Similar to the Predictive dialing option, Contact Center sends a record to the dialer for automatic outbound processing. The contact is displayed on the Agent Desktop and the customer simultaneously receives the call. The agent cannot cancel the contact or dial the number. Unlike the Predictive dialing option, Contact Center prevents the number of calls in progress from exceeding the number of idle agents.
- Manual: Contact Center presents a record to the agent for review. No time limit is given. The agent can cancel the contact or manually dial the number. This dialing option is manual.

Attention: Do not perform telephony tasks by using a mixture of steps on your telephone and the telephony toolbar. For example, do not place a call on hold using your telephone and then retrieve the call by clicking Unhold on the toolbar.

Prerequisites for Predictive Outbound

- You must have the hardware and software required to configure and use the Predictive Outbound feature.
- You must have configured agents with Predictive skillsets.
- If Microsoft Internet Explorer Enhanced Security is enabled on your computer, you must add the Predictive Outbound application server to your list of trusted sites.

Navigation

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- Changing to Not Ready status (page 50)
- Changing to Not Ready status when on a contact (page 51)
- Handling a Predictive or Progressive call (page 51)
- Handling a Paced call (page 52)
- Handling a Preview call (page 52)
- Handling a manual call (page 53)
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- Ending a contact (page 58)
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- Handling a standard callback call (page 61)

Changing to Ready status

Change to Ready status after you log on to Agent Desktop or any time you are ready to accept contacts.

Procedure steps

Step	Action
1	From the Agent Desktop application, click the status drop down icon.
2	Click **Go Ready**. *The agent status changes to Ready.*

--End--

Procedure job aid

Predictive Outbound statuses

Predictive Outbound status	Description	Actions Allowed
Not Ready	The agent cannot receive contacts. This is the initial status following agent logon.	Click Ready. Log off Agent Desktop.
Ready	The agent can receive a contact.	Click Not Ready. Log off Agent Desktop.
Talking	The agent is connected to a contact.	Click Transfer, Conference, Hold, Consult, Not Ready (pending), Callback, Disposition, or Hangup.
Preview	The agent has received a contact on the Agent Desktop and is previewing the contact before dialing, canceling, or receiving the contact.	Dial the contact's phone number. Cancel the contact. Receive the call when the timer expires.
Preview(Paced)	The agent has received a contact on the Agent Desktop and is previewing the contact before the system automatically connects the call.	None.
Preview(Manual)	The agent has received a contact on the Agent Desktop and is previewing the contact before dialing or canceling.	Dial the contact's phone number. Cancel the contact.

Predictive Outbound statuses

Predictive Outbound status	Description	Actions Allowed
Preview Callback	The agent has received a callback contact on the Agent Desktop and is previewing the contact before dialing, canceling, or receiving the contact.	Dial the contact's phone number. Cancel the contact. Receive the call when the timer expires.
Preview Callback(Manual)	The agent has received a callback contact on the Agent Desktop and is previewing the contact before dialing or canceling.	Dial the contact's phone number. Cancel the contact.
Wrapup	This status appears if: - the agent hangs up on the contact - the contact hangs up on the agent - the DN disconnects	Click Disposition, Originate, Callback, Not Ready (pending), or Hangup (if a secondary call is connected).
Talk Customer Hold	The agent is consulting with another agent while the customer is on hold.	Click Hangup, Callback, Not Ready (pending), Transfer, or Conference.
Voice Only	The agent is being consulted.	Click Leave Conference or Hold.
Conferenced(Owner)	The agent is consulting with another agent and a customer.	Click Leave Conference, Disposition, Hold, or Not Ready (pending).
Conferenced(Passive)	The agent is being consulted by another agent and a customer.	Click Hangup or Hold.
ConferencedExt(Owner)	The agent is consulting with an external party outside the Contact Center and a customer.	Click Leave Conference, Disposition, Hold, or Not Ready (pending).

Changing to Not Ready status

Change to Not Ready status to indicate that you are not ready to accept contacts.

Prerequisites

- Ensure that you have no active contact.

Procedure steps

Step	Action
1	From the Agent Desktop application, click the status drop down icon.

2 Click **Go Not Ready**.

The agent status changes to Not Ready.

--End--

Changing to Not Ready status when on a contact

Change to Not Ready status while still on a contact to indicate that you will not be ready to accept contacts when the current contact is completed.

Prerequisites

- Ensure that you have an active contact.

Procedure steps

Step	Action
1	From the Agent Desktop application, click the status drop down icon.
2	Click **Go Not Ready**. *The button changes to Not Ready and pending not ready appears in title bar. The agent status change remains pending and does not change to Not Ready until the current contact ends.*

--End--

Handling a Predictive or Progressive call

Handling a Predictive or Progressive call involves the same procedure for the agent. However, the Administrator can use Progressive calls to prevent the system from dialing calls that exceed the number of Idle agents.

Predictive and Progressive calls are delivered to your Agent Desktop automatically. The customer is on the line and the customer details and call script appear on your Agent Desktop.

Prerequisites

- Ensure that you are in Ready status.

Procedure steps

Step	Action
1	Respond to the call when it is presented to you. *Your agent status is Talking.*

--End--

Handling a Paced call

Handling a paced call enables you to preview a call while it is being dialed by the system. You cannot cancel the call or dial the customer's phone number.

Prerequisites

- Ensure that you are in Ready status.

Procedure steps

Step	Action
1	Preview the Customer Details and the call script that appear on the Agent Desktop. *Your agent status is Preview(Paced).*
2	Respond to the call when it is presented to you. *Your agent status is Talking.*

--End--

Handling a Preview call

Handling a Preview call enables you to preview a call before you or the system dials the customer's phone number. You have a predefined time period to preview the contact. Before this time period expires, you can dial the customer's phone number or cancel the contact. When the Preview time period expires, the system dials the customer and presents the call to you.

Prerequisites

- Ensure that you are in Ready status.

Procedure steps

Step	Action
1	Preview the customer details and the call script that appears on the Agent Desktop. *Your agent status is Preview. The Preview time period begins to time down and the Time Remaining is displayed in the Preview Contact dialog box.*
2	Choose one of the following actions:

- Select one of the customer phone numbers that appears in the **Preview Contact** dialog box, and click **Dial** to call the customer.
- Click **Cancel** to cancel the contact.
- Respond to the call when the Preview time period expires and the system automatically presents the call to you.

If you or the system dials the customer, your agent status is Talking. If you Cancel the contact, your agent status is Ready.

--End--

Handling a manual call

Handle a manual call using a procedure similar to handling a Preview call. However, a manual call is handled through the phone switch and not through the Predictive Outbound features.

Prerequisites

- Ensure that you are in Ready status.

Procedure steps

Step	Action
1	Preview the customer details and the call script that appears on the Agent Desktop. *Your agent status is Preview(Manual).*
2	Choose one of the following actions: • Select one of the customer phone numbers that appears in the **Preview Contact** dialog box, and click **Dial** to call the customer. • Click **Cancel** to cancel the contact. *If you dial the customer, your agent status is Talking. If you Cancel the contact, your agent status is Ready.*

--End--

Cancelling a call

Cancel a call if you want to reject a contact and place the contact back in the queue.

You can cancel only Preview or manual Predictive Outbound calls.

Prerequisites

- Ensure that you are in Ready status.
- Ensure that you have a Predictive skillset designated for handling telephone calls.

Procedure steps

Step	Action
1	Preview the customer details and the call script that appears on the Agent Desktop. *Your agent status is Preview or Preview(Manual).*
2	In the **Preview Contact** dialog box, click **Cancel**. *The contact is returned to the queue.*

--End--

Transferring a call

You can transfer a call to another agent in your Contact Center. Transferring a call requires several steps, particularly if the agent to whom you want to transfer a call is not in Ready status when the initial request is made. When you select an agent (or skillset, work session, or phone) and click Consult, a request to connect to the agent is generated. Following the request, one of the following occurs.

- If the requested agent is not logged on, the consult attempt fails immediately. The originating agent can try to transfer the call to another agent or can click Close to cancel the request.
- If the requested agent is logged on, but not in Ready status, the consult attempt fails immediately. The originating agent can try to transfer the call to another agent or can click Close to cancel the request.
- If the requested agent is logged on, but not in Ready status, and does not become available after 60 seconds, the request times out. The originating agent can try to transfer the call to another agent or can click Close to cancel the request.
- At any time while the request is being made, the originating agent can click Cancel to cancel the request. All other buttons on the Transfer dialog box are disabled while the request is being made.

An agent with Predictive Outbound skillsets can encounter the following scenarios during a call transfer:

- If an agent in a Predictive Outbound skillset performs a supervised transfer to an invalid or busy phone number, the agent hears a busy signal. To avoid a call disconnect, the agent must not complete the transfer if there is a busy signal. The agent must confirm that the third party is available before a transfer completion.

Prerequisites

- Ensure that the agent to which you want to transfer a call has a Predictive skillset and they are in Ready status.

Procedure steps

Step	Action
1	On the Agent Desktop Predictive Outbound Voice Path work item, click **Transfer**.
2	In the Transfer dialog box, select whether to transfer the call by **Skillset**, **Agent**, **Work Session**, or **Phone** number, and then select the party to whom you want to transfer the call from the updated list of available options. **OR** Type a phone number in the **Number to Dial** field.

Attention: In manual mode, if you press the Transfer/Conference buttons on the phone, the Transfer/Conference dialog box does not appear on Agent Desktop as it does for other modes of predictive outbound.

3	Click **Consult**. *If the requested agent is available, Consult changes to Transfer. A voice connection is established between the originating agent and the consulted agent. The customer is placed on Hold. The originating agent's status is Talk Customer Hold. The consulted agent's status is Voice Only.*
4	Speak to the consulted agent and provide any information needed before completing the transfer.
5	Click **Transfer**. *The transfer is completed. If the call is transferred to another agent, the originating agent is in Ready status and the consulted agent is in Talking status. If the call is transferred to an external party, the originating agent is in Wrapup status.*

--End--

Conferencing in another agent

You can conference in another agent in your Contact Center. Conferencing in another agent involves several steps, particularly if the agent you want to conference in is not in Ready status when you make the initial request. When you select an agent (or skillset, work session, or phone) and click Consult, a request to connect to the agent is generated. Following the request, one of the following occurs.

- If the requested agent is not logged on, the consult attempt fails immediately. The originating agent can try to conference in another agent or can click Close to cancel the request.
- If the requested agent is logged on, but not in Ready status, the consult attempt fails immediately. The originating agent can try to conference in another agent or can click Close to cancel the request. The originating agent can add the customer to the call and begin the conference by clicking the Conference button. The originating agent's status is Conferenced(Owner). The consulted agent's status is Conferenced(Passive).
- If the requested agent is logged on, but not in Ready status, and does not become available after 60 seconds, the request times out. The originating agent can try to conference in another agent or can click Close to cancel the request.
- At any time while the request is made, the originating agent can click Cancel to cancel the request. All other buttons on the Conference dialog box are disabled while the request is being made.

If an agent in a predictive outbound skillset initiates a conference call to an invalid or busy phone number, the agent hears a busy signal. To avoid a call disconnect, the agent must not complete a conference call if there is a busy signal. The agent must confirm that the third party is available before completing a conference call.

Prerequisites

- Ensure that the agent you want to conference in has a Predictive skillset and they are in Ready status.

Procedure steps

Step	Action
1	On the Agent Desktop work item, click **Conference**.
2	In the Conference dialog box, select whether you conference to an agent by **Skillset**, **Agent**, **Work Session**, or **Phone** number, and then select the party you want to conference in from the updated list of available options. **OR** Type a phone number in the **Number to Dial** field.

Attention: In manual mode, if you press the Transfer/Conference buttons on the phone, the Transfer/Conference dialog box will not appear on Agent Desktop as it does for other modes of predictive outbound.

3 Click **Consult**.

If the requested agent is available, Consult changes to Conference. A voice connection is established between the originating agent and the consulted agent. The customer is placed on Hold. The originating agent's status is Talk Customer Hold. The consulted agent's status is Voice Only.

4 Speak to the consulted agent and provide any information needed before adding the customer to the conference call.

5 Click **Conference**.

The conference call is active. The originating agent is in Talking status. The consulted agent is in Talking status.

--End--

Hanging-up and leaving a conference call

Hangup on a call with the customer, and depending on the call and agent state, leave a conference call with another agent.

Procedure steps

Step	Action
1	On the Agent Desktop Predictive Outbound voice path work item, click **hang up/leave conference**. *Hang up and Leave Conference disconnects the agent from the call.*

--End--

Procedure job aid

Options when ending a call

Predictive Outbound status	Result when hangup is clicked
Talking	The agent is disconnected from the customer and enters Wrapup status.
Wrapup (available if a second call is connected)	The call is disconnected.

Options when ending a call

Predictive Outbound status	Result when hangup is clicked
Talk Customer Hold (available for an agent who initiated a consultation and placed the customer on Hold)	The agent being consulted is disconnected. The remaining agent is reconnected with the customer and returns to Talking status.
Voice Only (available for an agent being consulted)	The agent being consulted is disconnected and returns to Ready status. The remaining agent remains connected with the customer.
Conferenced(Passive) (available for an agent that has been conferenced)	The agent being consulted is disconnected. The remaining agent remains connected with the customer.
Conferenced(Owner)	The agent is disconnected from both parties and the control of the call is passed to the other conferenced agent.
ConferencedExt(Owner) (available for an agent that initiated a conference)	The agent is disconnected from the external party and the customer. They still must disposition the contact.

Ending a contact

End a contact with the customer.

Procedure steps

Step	Action
1	On the Agent Desktop Predictive Outbound Voice Path work item, click **Disposition Contact**. *Hangup and Leave Conference disconnects the agent from the call.*
2	Select a disposition code from the **Disposition Codes** dialog.
3	Click **OK**. *If the customer call is still connected both the contact and the customer call are disconnected.*

--End--

Procedure job aid

Options when ending a call

Predictive Outbound status	Result when hangup is clicked
Talking	The Disposition Codes dialog box appears.
Wrapup	The Disposition Codes dialog box appears.
Conferenced(Owner)	The Disposition Codes dialog box appears.
ConferencedExt(Owner)	The Disposition Codes dialog box appears.

Originating a call

You can originate a call to a customer when you are in Wrapup status.

Prerequisites

- Ensure that you are in Wrapup status.

Procedure steps

Step	Action
1	Click **Initiate a Call**.
2	Select one of the customer phone numbers in the **Select Destination** box. OR Manually type a phone number in the **Number To Dial** box.
3	Click **Dial**.

--End--

Scheduling a callback

Schedule a callback when you want to arrange a callback with a customer for a future date or time.

Prerequisites

- Ensure that you have a Predictive skillset designated to handle telephone calls.

Procedure steps

Step	Action

1. Click **Schedule Callback**.
2. In the Schedule Callback window, select a **Date** and **Time** for the callback.
3. Select whether the time for the callback is based on the **Agent Local Time** or the **Customer Time**.
4. Select one of the customer phone numbers in the **Phone** list
   OR
   Manually type a phone number in the **Number** box.
5. Select the **Type** of callback.
6. Select an **Agent** for the callback.
7. Type a note in the **Memo** box, if applicable to the callback.
8. Click **OK**.

--End--

Procedure job aid

Schedule Callback fields

Field	Descriptions
Date	Date for the scheduled callback.
Time	Time for the scheduled callback. The default for the scheduled callback is the current contact center time plus 20 minutes.
Agent Local Time or Customer Time	The location where the Date and Time apply. Select Agent Local Time to use the Date and Time of the contact center for the callback. Select Customer Time to use the Date and Time of the customer's location for the callback.
Number	Manual phone number to use for the callback. If a manually entered phone number is in the Number field, it is used instead of a phone number in the phone list.
Phone	List of available phone numbers for the customer. To use a select number in the phone list, ensure that the Number field is empty.

Schedule Callback fields

Field	Descriptions
Type	Type of callback or Predictive Outbound campaign. The type selected determines the Agent and Team names that you can select. The callback types are: • Standard: The callback goes to any available agent in the original Predictive Outbound campaign type. • Personal: The callback goes to the agent scheduling the callback, regardless of the Predictive Outbound campaign type or Team assigned. • Enterprise Campaign: The callback goes to the next available agent, if the agent scheduling the callback is not available. • Private Campaign: The callback goes to the agent scheduling the callback. • Enterprise Team: The callback goes to the next available agent in the assigned team. • Private Team: The callback waits for the agent scheduling the callback to be assigned to the team.
Agent	Agent for the callback. The team selected determines the agent names that can be selected.
Team	Team for the callback. The type of callback determines the Team names that can be selected.
Memo	Memo text entered by the agent scheduling the callback will appear at the bottom of the call script when the callback contact is presented to an agent.

Handling a standard callback call

Handling a Standard callback call is similar to handling a normal call in each mode of predictive (Manual, Paced, Preview, Progressive and Predictive) apart from memo text. A contact is presented to an agent as a result of a scheduled Standard callback type.

A Standard callback call is automatically delivered to your Agent Desktop. The customer details and call script, including any memo notes entered when the scheduled callback was created, appear on your Agent Desktop.

You can preview or cancel or dial the customer's phone number if the contact presented to the agent is a Preview or manual contact.

Prerequisites

- Ensure that you are in Ready status.
- The work session on CPSEE Application server is active.

Procedure steps

Step	Action
1	Respond to the call when it is presented to you. *Your agent status is Talking.*

--End--

Handling a non-standard callback call

Handling a non-Standard callback call is similar to handling a Preview call for the agent. A contact is presented to an agent as a result of a scheduled callback of any of the following types:

- Personal
- Enterprise campaign
- Private campaign
- Enterprise team
- Private team

For any of these callback call types you can preview a call before you or the system dials the customer’s phone number. You are given a predefined time period to preview the contact. Before this time period expires, you can dial the customer’s phone number or cancel the contact. When the Preview time period expires, the system dials the customer and presents the call to you.

Prerequisites

- Ensure that you are in Ready status.

Procedure steps

Step	Action
1	Preview the customer details and the call script that appears on the Agent Desktop. *Your agent status is Preview Callback. The Preview time period begins to time down and the Time Remaining is displayed in the Preview Contact dialog box.*

2 Choose one of the following actions:

- Select one of the customer phone numbers that appears in the **Preview Contact** dialog box, and click **Dial** to call the customer.
- Click **Cancel** to cancel the contact.
- Respond to the call when the Preview time period expires and the system automatically presents the call to you.

If you or the system dials the customer, your agent status is Talking. If you Cancel the contact, your agent status is Ready.

--End--

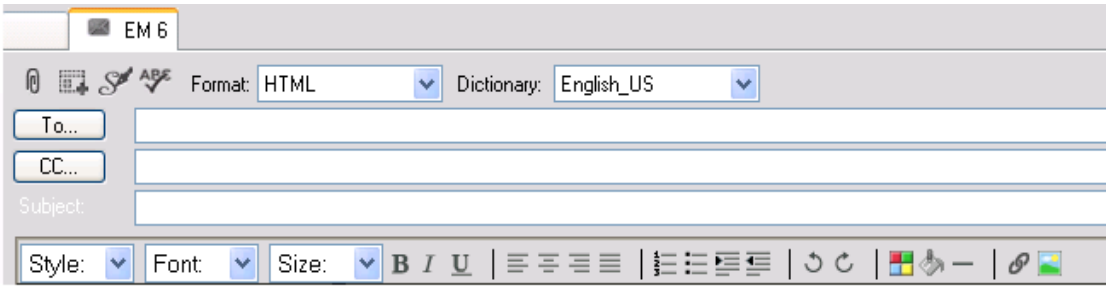
E-mail

This chapter describes how to perform e-mail tasks by using the Avaya Aura™ Agent Desktop:

- Accept the incoming e-mail contact.
- Review and update customer information.
- Send a reply.
- Add an attachment.
- Insert a template or autosignature.
- Forward an e-mail message.
- Finish an e-mail message.
- Spell check an e-mail message.

You can also use Agent Desktop to create a new e-mail message.

Example of e-mail toolbar



The Agent Desktop e-mail editor offers improved e-mail editing, formatting feature buttons and management in HTML-format e-mail messages. The feature buttons are added to the bottom of the e-mail toolbar.

- Undo (Ctrl+z)
- Text font
- Text style
- Color text
- Bold text
- Italic text
- text indent
- Underlined text
- Highlighted text

- Horizontal line-rule support
- Insert image links
- Insert hyperlink
- Text justification
- Numbered lists
- Bulleted lists

These formatting and additional insertion buttons are only displayed on the e-mail editor toolbar when HTML format e-mail is selected. Plain text format e-mail do not support text formatting.

Blind carbon copy (Bcc:) is available only when using the e-mail Address Book.

The following table shows the e-mail feature buttons.

E-mail editing and formatting controls

Control	Function
	Bold selected text
	Italicize selected text
	Underline selected text
	Align text with left margin
	Center text
	Align text with right margin
	Numbered list items
	Bulleted list items
	Indent selected text
	Outdent selected text
	Undo last change
	Redo the last change
	Change color of selected text
	Insert a hyperlink
	Insert a graphic
	E-mail attachment
	Spell check
	E-mail signature
	E-mail templates

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- Replying to an e-mail message (page 69)
- Using the address book to reply to a contact (page 72)
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- Using a template response (page 74)
- Defining your default attachment folder (page 74)
- Adding an attachment to your e-mail response (page 74)
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- Following up on a contact (page 78)
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- Transferring a contact outside the contact center (page 79)
- Printing contact details (page 79)

Accepting an incoming contact

Accept an incoming contact to display customer details and begin contact with a customer. Agent Desktop expands to show the customer details and the call timer appears in the work item. The new incoming e-mail is presented as a new work item in the work list window.

Procedure steps

Step	Action
1	On the Agent Desktop, click **Accept**. *The e-mail opens in the E-mail Display panel.* *The customer details for the e-mail opens in the bottom left hand Customer Details panel.*

--End--

Declining an incoming contact

Decline an incoming contact if you cannot handle the call. The new incoming e-mail disappears from the work list.

Procedure steps

Step	Action
1	On the Agent Desktop, click **Reject**.

--End--

Verifying customer information

Verify customer information by viewing the left side of the Customer Details window, which shows customer details, the history of recent customer interactions, and other information.

If you accept a contact, or choose to read a contact, a maximum of 15 contacts appear before your selection and a maximum of 15 contacts appear after your selection on the History tab. Use the navigation arrow buttons to scroll through the contacts that appear in the customer history. A page shows a maximum of 31 contacts. The status bar indicates the contacts you are viewing and the total number of contacts in the history list.

You can use the Customer History panel on the left pane of the Agent Desktop window to view details of previous interactions with the customer, including automatic responses sent and the content of previous e-mail messages.

Procedure steps

Step	Action
1	On the Agent Desktop, click the **Details** tab to verify customer contact information.
2	Click the **History** tab to view the various actions in the customer history, including all Multimedia types.
3	Click the **CI Details** tab to view Customer Interface Web site details.

--End--

Replying to an e-mail message

Reply to an e-mail message when a customer sends an e-mail to the Contact Center requesting a response. Create a response to a customer in the same format as the original request.

You can use several features in the Agent Desktop interface to create your e-mail response in HTML or plain text:

- Auto suggestions
- the address book
- one or more response templates
- an automatic signature
- an attached file
- the spelling checker

You can also add a comment to an e-mail message in the Agent Note box for reference for later communications with the customer. The customer does not see the content of the Agent Note box.

Prerequisites

- Ensure that you understand how to use the address book to reply to a contact. See Using the address book to reply to a contact (page 72).
- Ensure that you understand how to create a template response. See Using a template response (page 74).
- Ensure that you understand how to use the spell-check feature. See Using the spelling checker (page 76).
- Ensure that you understand how to add attachments to an e-mail message. See Adding an attachment to your e-mail response (page 74).

Procedure steps

Step	Action
1	After you review the customer contact, click **Reply**.
2	In the E-mail Response window, accept the default To e-mail address, with the same e-mail address from which the message was sent, or click **To**, **Cc** to add other e-mail addresses from the corporate address book or multimedia database.
3	In the **Subject** box, accept the subject currently displayed or edit the subject.
4	Add text to the reply using one or both of the following methods: • Type the message text. • Add a template response.
5	To sign the e-mail or to insert an automatic signature, click the **Insert autosignature** button.
6	If you use HTML text and you want to bold, underline, or italicize any text, select the text and click the appropriate button to apply formatting. You cannot format plain text.

7	To change the text size, select the text and click the up arrow to increase the font size, or click the down arrow to decrease the font size.
8	To perform a spell check, click the Check Spelling icon.
9	To add an attachment to the e-mail response, click Insert a file.
10	In the **Agent Note** box, type additional information about the contact or the customer. Only agents and supervisors can view the information in the **Agent Note** box.
11	Click **Send**.
12	Close the contact. If required, select a reason for closing the contact.

--End--

Creating an e-mail message

Create an e-mail message to send to a customer.

Prerequisites

- Ensure that you are assigned to an e-mail skillset.
- Ensure that you are not currently handling a contact.

Procedure steps

Step	Action
1	On the Agent Desktop Action bar, click **Initiate Email**.
2	In the **text** box, enter the e-mail address of the customer, and add additional **Cc** addresses as required.
3	Click **Create Email**.
4	In the **Subject** box, type the message subject.
5	In the body text box, type the message text. You can type text or use a template.
6	To insert a file, click **Insert a file**.
7	Select the appropriate skillset from the **Skillset** list.
8	In the **Agent Note** box, type information about the contact or the customer. Only agents and supervisors can view the information in the Agent Note box.
9	Click **Send**. *The system searches the database for the customer e-mail address. If the customer does not exist in the database, the system creates a new customer record, as well as a new contact and response record. The contact closes automatically.*

--End--

Using the address book to reply to a contact

Use the address book to search for an e-mail address in the corporate address book or in the customer database when you use e-mail to reply to a customer or transfer a contact. You can search for addresses to add to the To, carbon copy (Cc), or blind carbon copy (Bcc) fields of your e-mail message. The address book can contain information from an external directory, a local directory, or a customer database.

Procedure steps

Step	Action
1	In the e-mail window, click **To**, **Cc**.
2	In the **Select Names** dialog box, in the **Search for records from** box, select the database to search. *The address book appears and displays a list of entries from the database in the left pane, sorted alphabetically by last name.*
3	Type a name in the search field in the following format: last name, first name. The search field is not case-sensitive. *The list scrolls to the appropriate name or the closest match.*
4	Select a name, and then click **To**, **Cc**, or **Bcc** to add the name to the appropriate recipient list. *You can double-click on a name to add it to the To list.*
5	To display additional details about any name that appears in the address book, select the name, and then right-click **Properties**.
6	Click **Close** to close the **Properties** window and return to the address book.
7	After you select all required recipients for the e-mail message, click **OK**.

--End--

Removing a name from the recipient list

Remove a name from the recipient list if you do not want to send the e-mail to the contact. Removing a name from your recipient list does not remove the name from your address book or database.

Procedure steps

Step	Action

1 Select the name from the **To**, **Cc**, or **Bcc** field, and then press **Delete** on your keyboard.

--End--

Creating a template response

Create and store your own templates to use predefined messages or responses to typical customer queries. You can use part of all of the template text as your e-mail response.

Procedure steps

Step	Action
1	Create the response message in a text editor, such as Notepad.
2	Click **Save As**.
3	Name the file using a descriptive name and ensure that the file name has a .txt extension (for example, WarrantyURL.txt).
4	Navigate to the folder in which to store the template response file.
5	Save the file.

--End--

Defining your default template folder

Define the location of the default template folder to use if you want to use a template in an e-mail response.

Procedure steps

Step	Action
1	On the Top bar, click **User Preferences**.
2	Select the **Preferences** tab.
3	In the **Default Template Location** box, type the complete path to the template folder or click **Change** to select a new folder location.
4	Click **Save**.

--End--

Using a template response

Use a template response that you previously created for responses to typical customer queries.

Procedure steps

Step	Action
1	In the e-mail window, click **Insert Template**.
2	Navigate to the template folder. *If you defined a template folder in the user settings, the default template folder automatically appears.*
3	Select the template file, and then click **Open**.
4	If necessary, edit the text in the body of the e-mail message.

--End--

Defining your default attachment folder

Define a default attachment folder in which to store files to add as attachments to e-mail messages. You can add a file from the Shared Files folder that your administrator creates, or you can navigate to any other directory, folder, or subfolder on your computer and attach a file from there. You must save file attachments with UTF-8 encoding.

Procedure steps

Step	Action
1	On the Top bar, click **User Preferences**.
2	Select the **Preferences** tab.
3	In the **Default Attachment Location** box, type the path to the folder containing the attachment, or click **Change** to change the current folder location.
4	Click **Save**.

--End--

Adding an attachment to your e-mail response

You can add one or more file attachments to an e-mail message that you send to a customer.

Procedure steps

Step	Action
1	Click **Insert File**.
2	Click **Attach**. *If you defined an attachment folder in the user settings, the default attachment folder automatically appears.*
3	To add a file from a different location, navigate to the appropriate directory or folder.
4	Locate and select the file to attach.
5	Click **Open**.

--End--

Viewing e-mail attachments

View e-mail attachments that a customer attached, as well as any files that you, or another agent attached, using the Contact Details window. The attachments can also be based on the accepted contact types (voice mail, fax, or scanned document).

Attention: Some Internet browsers do not support some attachment formats.

Procedure steps

Step	Action
1	In the **Contact Details** window, click the **History** tab.
2	Double-click **Attachments** to view attachments in a new browser window.

--End--

Removing an attachment from an e-mail response

You can remove one or more attachments from an e-mail response to a contact.

Procedure steps

Step	Action
1	Click **Remove**.
2	In the **Select Attachment(s) to remove** list, select the attachment you want to delete. Use **Ctrl+click** to select multiple attachments.

3 Click **OK**.

--End--

Using the spelling checker

Use the spelling checker on the Agent Desktop interface to locate spelling errors in your e-mail message. You can enable or disable the automatic spell-check feature.

You can use the User Settings window to select a default language for the spell checking dictionary. You can also specify a spell-check dictionary for a particular e-mail message by selecting a language from the list on the right side of the toolbar.

The spell-check feature highlights words in the e-mail subject and body that are considered incorrect and presents alternatives, which you can accept or ignore. If you accept the change, the new spelling replaces the original word. If you ignore the change, the original spelling remains. The spell-check feature closes automatically when it can find no more misspelled words.

Attention: The spell-check feature does not check spelling in attachments.

Procedure steps

Step	Action
1	When you finish typing your e-mail message, click the spell-check icon.
2	If the spell-check feature highlights a word, perform one of the following steps: • Click **Ignore** to keep the original spelling of the word. • Click **Ignore All** to keep the original spelling of all instances of the word. • Click **Add** to add the selected word to the dictionary. • Click **Replace** to replace the word with the suggested text. • Click **Replace All** to replace all instances of the word with the suggested text and to add the word to the dictionary. • Click **Options** to configure conditions for the spell-check feature, such as to ignore words with digits, words in uppercase, and words with HTML tags. • Click **Cancel** to terminate the spell-check feature.

--End--

Closing the e-mail contact

Close the e-mail contact when the contact is complete. When you close a contact, select a Closed Reason code. The Closed Reason codes that appear are applicable to the contact type being closed.

Procedure steps

Step	Action
1	Click **Close** to complete the contact.
2	Select one of the configured **Closed Reason** codes that best describes the reason you closed your e-mail message.

--End--

Postponing work on a contact

Postpone work on a contact if you are waiting for further information for the contact.

Prerequisites

- Copy and save text from an e-mail message to have the information available when the contact becomes active again. Otherwise, if you started an e-mail message and the work is postponed, the content of the e-mail message is lost.

Procedure steps

Step	Action
1	Click **Reschedule** to postpone work on the contact. You still own the contact and can continue to work on the contact when it is rescheduled to you.
2	In the **Present Contact at** dialog box, enter the time and date to reopen the contact. *The default Pending timer is configured in the Contact Center Multimedia Administrator. The contact reopens when the Pending timer expires.*
3	In the **Agent Note** field, add a note to the contact to remind yourself why the contact is in Pending state. You can view the pending contact in the History tab.

--End--

Following up on a contact

Follow up on a contact after you complete a contact but want to perform a follow-up action, for example, to transfer a contact to another agent.

Procedure steps

Step	Action
1	Click **Follow-up**.
	The e-mail display control appears.
2	Perform the necessary follow-up action on the contact.

--End--

Transferring a contact within the contact center

Transfer a contact to another skillset or to a specific agent within the Contact Center.

When you transfer a contact to a skillset or agent, you also transfer ownership of the contact. The system automatically forwards the entire contact, including any attachments, to the new agent. You can also add new content to the contact.

Procedure steps

Step	Action
1	Click **Transfer**.
2	Click the **Skillset** tab to assign the contact to any agent with a particular skillset, or click the **Agent** tab to assign the contact to a specific agent.
3	Select the skillset or agent to which you want to transfer the contact.
4	In the **Agent Note** box, type a brief note about the reason for the transfer.
5	Click **Transfer**.

--End--

Transferring a contact outside the contact center

Transfer a contact to an e-mail address outside the Contact Center for consultation.

When you transfer a contact to an external e-mail address, you must manually add any attachments you want to send with the e-mail.

Procedure steps

Step	Action
1	Click **Transfer**.
2	Click the **External** tab.
3	Enter the e-mail address to which you want to transfer the contact, or click **To** to select an address from the corporate address book.
4	In the **Agent Note** box, type a brief note about the reason for the transfer.
5	To add an attachment, click **Attach**.
6	Click **Transfer**.

--End--

Printing contact details

Print a summary of the interaction with a contact. All information shown in the bottom left of the e-mail or outbound contact window prints. Print Preview is also supported.

Procedure steps

Step	Action
1	Click **Print**.

--End--

Fax message

This chapter describes how to perform fax message tasks. Use Avaya Aura™ Agent Desktop to perform the following tasks when you handle a fax message:

- Accept the incoming fax message.
- Review the fax message.
- Send a reply.
- Forward a fax message.

Fax messages from customers are forwarded by a fax server to an e-mail address within the contact center. The fax is sent to an appropriate skillset queue. If you are assigned to this skillset, then the fax message is presented to you. You reply to the fax message by sending an e-mail message back to the fax server. The fax server then sends the reply fax to the customer.

Prerequisites

- Ensure that your status is ready.
- Ensure that you have the assigned skillset to handle fax messages.

Navigation

- Accepting an incoming fax message (page 81)
- Declining an incoming fax message (page 82)
- Reviewing a fax message (page 82)
- Replying to a fax message (page 82)
- Closing a fax message (page 83)
- Transferring a fax message (page 84)

Accepting an incoming fax message

Accept an incoming fax message to view the message. Agent Desktop presents this new fax message as a new work item in the work list window.

Procedure steps

Step	Action
1	On the Agent Desktop work list, select the new fax message work item, and click **Accept**.

The fax message opens in the fax display panel.

--End--

Declining an incoming fax message

Decline an incoming fax message if you cannot handle the fax.

Procedure steps

Step	Action
1	On the Agent Desktop, select the new fax message work item and click **Reject**.

--End--

Reviewing a fax message

Use the Agent Desktop fax viewer to review a fax message.

Prerequisites

- Ensure that you accepted a fax message and opened it in the fax viewer.

Procedure steps

Step	Action
1	On the Agent Desktop fax viewer, click **Navigate** to view all the pages of the fax message.
2	Click **Rotation** to rotate the fax message.
3	Click **Zoom** to magnify the fax message.

--End--

Replying to a fax message

Reply to a fax message when a customer sends a fax message to the Contact Center requesting a response. You reply to a fax message by sending an e-mail message to a fax server. The fax server then sends a fax back to the customer.

Prerequisites

- Ensure that you understand how to use the spell-check feature. See Using the spelling checker (page 76).

Procedure steps

Step	Action
1	After you review the customer contact, click **Reply**.
2	In the fax response window, accept the default **To** e-mail address, with the same e-mail address from which the message was sent.
3	In the **Subject** box, accept the subject currently displayed or edit the subject.
4	Type the reply in the e-mail editor text box.
5	To sign the e-mail or to insert an automatic signature, click **auto signature**.
6	If you use HTML text and you want to bold, underline, or italicize any text, select the text, and click the appropriate button to apply formatting. You cannot format plain text.
7	To perform a spell check, click **Check Spelling**.
8	In the **Agent Note** box, type additional information about the contact or the customer. Only agents and supervisors can view the information in the **Agent Note** box.
9	Click **Send**.
10	Close the contact. If required, select a reason for closing the contact.

--End--

Closing a fax message

Close a fax message when the contact is complete. When you close a contact, select a Closed Reason code. The Closed Reason codes that appear apply to the contact type being closed.

Procedure steps

Step	Action
1	Click **Finish** to complete the fax message.
2	Select a **Closed Reason** code that best describes the reason you closed your fax message.

--End--

Transferring a fax message

Transfer a fax message to another skillset or to a specific agent in the contact center. When you transfer a fax message to a skillset or agent, you also transfer the ownership of the contact.

Procedure steps

Step	Action
1	Click **Transfer**.
2	Click the **Skillset** tab to assign the contact to any agent with a particular skillset, or click the **Agent** tab to assign the fax message to a specific agent.
3	Select the skillset or agent to which you want to transfer the contact.
4	In the **Agent Note** box, type a brief note about the reason for the transfer.
5	Click **Transfer**.

--End--

Scanned document

This chapter describes how to perform scanned document tasks. Use Avaya Aura™ Agent Desktop to perform the following tasks when you handle a scanned document:

- Accept an incoming scanned document.
- Review the scanned document.
- Reply to a scanned document.
- Forward a scanned document.

In the contact center, a scanned document is an electronic version of a printed page or document. Scanned documents are forwarded in, TIFF format, by a document imaging server to an e-mail address. You can reply to the scanned document by sending an e-mail message to a printer. The printed e-mail message is then sent to the customer.

Prerequisites

- Ensure that your status is Ready.
- Ensure that you are in a skillset to handle scanned documents.

Navigation

- Accepting an incoming scanned document message (page 85)
- Declining an incoming scanned document message (page 86)
- Reviewing a scanned document message (page 86)
- Replying to a scanned document message (page 87)
- Closing a scanned document message (page 87)
- Transferring a scanned document (page 88)

Accepting an incoming scanned document message

Accept an incoming scanned document message. Agent Desktop presents this new scanned document as a new work item in the work list window.

Procedure steps

Step	Action
1	On the Agent Desktop work list, select the new scanned document work item, and click **Accept**.

The scanned document opens in the document display panel.

--End--

Declining an incoming scanned document message

Decline an incoming scanned document message if you cannot handle the document.

Procedure steps

Step	Action
1	On the Agent Desktop, select the new scanned document work item and click **Reject**.

--End--

Reviewing a scanned document message

Use the Agent Desktop viewer to review a scanned document message.

Prerequisites

- Ensure that you accepted a scanned document and opened it in the viewer.

Procedure steps

Step	Action
1	On the Agent Desktop document viewer, click **Navigate** to view all the pages of the document.
2	Click **Rotation** to rotate the scanned document.
3	Click **Zoom** to magnify the scanned document.

--End--

Replying to a scanned document message

Reply to an scanned document message when a customer sends a scanned document to the contact center requesting a response. You can reply to the scanned document by sending an e-mail message to a printer. The printed e-mail message is sent to the customer.

Prerequisites

- Ensure that you understand how to use the spell-check feature. See Using the spelling checker (page 76).

Procedure steps

Step	Action
1	After you review the customer contact, click **Reply**.
2	In the response window, accept the default **To** e-mail address, with the same e-mail address from which the message was sent.
3	In the **Subject** box, accept the subject currently displayed or edit the subject.
4	Type the reply in the e-mail editor text box.
5	To sign the e-mail or to insert an auto signature, click **auto signature**.
6	If you use HTML text and you want to bold, underline, or italicize any text, select the text and click the appropriate button to apply formatting. You cannot format plain text.
7	To perform a spell check, click **Check Spelling**.
8	In the **Agent Note** box, type additional information about the contact or the customer. Only agents and supervisors can view the information in the **Agent Note** box.
9	Click **Send**.
10	Close the contact. If required, select a reason for closing the contact.

--End--

Closing a scanned document message

Close the scanned document message when the contact is complete. When you close a contact, select a Closed Reason code. The Closed Reason codes that appear are applicable to the contact type being closed.

Procedure steps

Step	Action
1	Click **Finish** to complete the scanned document.

2 Select one of the configured **Closed Reason** codes that best describes the reason you closed your scanned document.

--End--

Transferring a scanned document

Transfer a scanned document to another skillset or to a specific agent within the contact center. When you transfer a scanned document to a skillset or agent, you also transfer ownership of the contact.

Procedure steps

Step	Action
1	Click **Transfer**.
2	Click the **Skillset** tab to assign the contact to any agent with a particular skillset, or click the **Agent** tab to assign the scanned document to a specific agent.
3	Select the skillset or agent to which you want to transfer the contact.
4	In the **Agent Note** box, type a brief note about the reason for the transfer.
5	Click **Transfer**.

--End--

Voice mail messages

This chapter describes how to perform tasks to handle voice mail messages. Use Avaya Aura™ Agent Desktop to perform the following tasks when you handle a voice mail message:

- Accept the incoming voice mail message.
- Listen to a voice mail message.
- Reply to a voice mail message.

In the contact center voice mail messages are forwarded by a voice mail server to an e-mail address as a .wav attachment. The voice mail message is then sent to an appropriate skillset queue. If you are assigned to this skillset, then the voice mail message is presented to you.

Prerequisites

- Ensure that your status is Ready.
- Ensure that you have the assigned skillset to handle voice mail messages.

Navigation

- Accepting an incoming voice mail message (page 89)
- Declining an incoming voice mail message (page 90)
- Listening to a voice mail message (page 90)
- Replying to a voice mail message (page 91)
- Closing a voice mail message (page 91)
- Transferring a voice mail message (page 92)

Accepting an incoming voice mail message

Accept an incoming voice mail message to view the message. Agent Desktop presents this new voice mail message as a new work item in the work list window.

Procedure steps

Step	Action
1	On the Agent Desktop work list, select the new voice mail message work item, and click **Accept**.

The voice mail message opens in the e-mail display panel. The voice mail is a .wav attachment to this e-mail.

--End--

Declining an incoming voice mail message

Decline an incoming voice mail message if you cannot handle the voice mail.

Procedure steps

Step	Action
1	On the Agent Desktop, select the new voice mail message work item and click **Reject**.

--End--

Listening to a voice mail message

Use the default Windows Media player to listen to a voice mail message.

Prerequisites

- Ensure that you accepted a voice mail message and opened it in the e-mail viewer.
- Ensure you have a media player that supports .wav file format audio files.

Procedure steps

Step	Action
1	On the Agent Desktop e-mail viewer, under **Attachments**, double-click the .wav attachment to open it in your default media player.
2	Listen to the voice mail message.

--End--

Replying to a voice mail message

Reply to an voice mail message when a customer sends a voice mail message to the contact center requesting a response. You reply to a voice mail message by phoning the customer.

Prerequisites

- Ensure that you have the customer phone from the voice mail or from the Customer Information panel.

Procedure steps

Step	Action
1	On the Agent Desktop Action bar menu, click **Initiate Call**.
2	In the text box to the left of **Initiate Call**, enter the phone number to dial.
3	Click **Initiate Call** again. *The phone number is dialed. A new work item is added to the work list and the call timer on the work items starts to increment.*
4	Click **Release** when you complete the call.
5	If required by your supervisor, type an activity code in the **Activity Code** box, and then press **Enter**.

--End--

Closing a voice mail message

Close the voice mail message when the contact is complete. When you close a contact, select a Closed Reason code. The Closed Reason codes that appear are applicable to the contact type being closed.

Procedure steps

Step	Action
1	Click **Finish** to complete the voice message.
2	Select one of the configured **Closed Reason** codes that best describes the reason you closed your voice mail message.

--End--

Transferring a voice mail message

Transfer a voice mail message to another skillset or to a specific agent within the contact center. When you transfer a voice mail message to a skillset or agent, you also transfer ownership of the contact.

Procedure steps

Step	Action
1	Click **Transfer**.
2	Click the **Skillset** tab to assign the contact to any agent with a particular skillset, or click the **Agent** tab to assign the voice mail message to a specific agent.
3	Select the skillset or agent to which you want to transfer the contact.
4	In the **Agent Note** box, type a brief note about the reason for the transfer.
5	Click **Transfer**.

--End--

Short Message Service text message

This chapter describes how to perform Short Message Service (SMS) text message tasks. Use Avaya Aura™ Agent Desktop to perform the following tasks when you handle an SMS text message:

- Accept the incoming SMS text message.
- Send a reply.
- Forward an SMS text message.
- Check the spelling of an SMS text message.

SMS text messages from customers are forwarded by an SMS gateway to an e-mail address within the contact center. The SMS text message is then sent to an appropriate skillset queue. If you are assigned to this skillset, then the SMS text message is presented to you.

Prerequisites

- Ensure that your status is Ready.
- Ensure that you have the assigned skillset to handle SMS text messages.

Navigation

- Accepting an incoming SMS text message (page 93)
- Declining an incoming SMS text message (page 94)
- Replying to an SMS text message (page 94)
- Using the spelling checker (page 95)
- Closing an SMS text message contact (page 96)
- Transferring an SMS text message (page 96)

Accepting an incoming SMS text message

Accept an incoming SMS text message to display customer details and begin contact with a customer. Agent Desktop expands to show the customer details and the call timer appears in the work item. The new incoming SMS text message is presented as a new work item in the work list window.

Procedure steps

Step	Action

1 On the Agent Desktop work list, select the new SMS text message work item, and click **Accept**.

The SMS text message opens in the display panel.
The customer details for the SMS Test message opens in the bottom left hand Customer Details panel.

--End--

Declining an incoming SMS text message

Decline an incoming SMS text message if you cannot handle the contact.

Procedure steps

Step	Action
1	On the Agent Desktop, select the new SMS text message work item and click **Reject**.

The SMS text message work item is removed from the work list.

--End--

Replying to an SMS text message

Reply to an SMS text message when a customer sends an SMS text message to the contact center requesting a response. Create a response to a customer in the same format as the original request.

You can use several features in the Agent Desktop interface to create your response:

- one or more response templates
- the spelling checker

You can add a comment to the message in the Agent Note box for reference for later communications with the customer. The customer does not see the content of the Agent Note box.

Procedure steps

Step	Action
1	After you review the customer contact, click **Reply**.
2	In the E-mail Response window, accept the default To e-mail address, with the same e-mail address from which the message was sent, or click **To**, **Cc** to add

other e-mail addresses from the corporate address book or multimedia database.

3 In the **Subject** box, accept the subject currently displayed or edit the subject.

4 Add text to the reply using one or both of the following methods:

- Type the message text.
- Add a template response.

5 To perform a spell check, click **Check Spelling**.

6 In the **Agent Note** box, type additional information about the contact or the customer. Only agents and supervisors can view the information in the **Agent Note** box.

7 Click **Send**.

8 Close the contact. If required, select a reason for closing the contact.

--End--

Using the spelling checker

Use the spell-check feature on the Agent Desktop interface to locate spelling errors in your l message. You can enable or disable the automatic spell-check feature.

You can use the User Settings window to select a default language for the spell-check dictionary. You can also specify a spell-check dictionary for a particular e-mail message by selecting a language from the list on the right side of the toolbar.

The spell-check feature highlights words in the SMS text message subject and body that are considered incorrect and presents alternatives, which you can accept or ignore. If you accept the change, the new spelling replaces the original word. If you ignore the change, the original spelling remains. The spell-check feature closes automatically when it can find no more misspelled words.

Procedure steps

Step	Action
1	When you finish typing your SMS text message, click **spell-check**.
2	If the spell-check feature highlights a word, perform one of the following steps: • Click **Ignore** to keep the original spelling of the word. • Click **Ignore All** to keep the original spelling of all instances of the word. • Click **Add** to add the selected word to the dictionary.

- Click **Replace** to replace the word with the suggested text.
- Click **Replace All** to replace all instances of the word with the suggested text and to add the word to the dictionary.
- Click **Options** to configure conditions for the spell-check feature, such as to ignore words with digits or words in uppercase.
- Click **Cancel** to terminate the spell-check feature.

--End--

Closing an SMS text message contact

Close the SMS text message when the contact is complete. When you close a contact, select a Closed Reason code. The Closed Reason codes that appear are applicable to the contact type being closed.

Procedure steps

Step	Action
1	Click **Close** to complete the contact.
2	Select one of the configured **Closed Reason** codes that best describes the reason you closed your SMS text message.

--End--

Transferring an SMS text message

Transfer an SMS text message to another skillset or to a specific agent within the contact center.

When you transfer an SMS text message to a skillset or agent, you also transfer ownership of the contact.

Procedure steps

Step	Action
1	Click **Transfer**.
2	Click the **Skillset** tab to assign the contact to any agent with a particular skillset, or click the **Agent** tab to assign the contact to a specific agent.
3	Select the skillset or agent to which you want to transfer the SMS text message.

4 Select the **External** tab if you want to transfer the SMS text message to outside the Contact Center.

5 In the **Agent Note** box, type a brief note about the reason for the transfer.

6 Click **Transfer**.

--End--

Web communications

This chapter describes how to use the Web communications feature to communicate directly with customers in real time over the Internet by using the Avaya Aura™ Agent Desktop:

- Accept an incoming contact.
- Review and update customer information.
- Send an automated response.
- Push a Web page.
- Transfer a chat session.
- Conference a chat session.
- Check whether the customer's browser is still connected.
- Check the time of the most recent customer action and whether the customer is currently typing a message.
- Respond to the customer (e-mail or voice) if more information or clarification is needed.
- End a chat session.

This chapter describes how to perform the tasks for text chat sessions.

Navigation

- Accepting a Web communications contact (page 100)
- Customizing a tab name (page 101)
- Declining a Web communications contact (page 101)
- Sending a chat message (page 102)
- Adding an auto-phrase to a chat message (page 102)
- Pushing a Web page to a customer (page 102)
- Transferring a chat session (page 103)
- Conferencing a chat session (page 104)
- Ending the Text Chat session (page 104)
- Sending the chat log in an e-mail message (page 105)

Accepting a Web communications contact

Accept a Web communications contact to communicate privately with a customer in real time over the Internet. An agent and a customer can use the text chat component of the Agent Desktop to conduct a two-way conversation by exchanging messages.

A customer requests a chat session by clicking a text chat icon on the Web site. The customer is presented with a form to fill in and can select the appropriate skillset, subject, and objective for their chat session. The customer is then placed into Web-on-hold, or a similar treatment configured in your contact center, while waiting for an agent to accept their chat request.

The text chat frame displays a complete record of the conversation as well as any URLs that you previewed or pushed to the customer. Each chat message can contain up to 4045 characters.

Agent Desktop can be configured to give visual and audible alerts when a contact is presented. These features are configured by an administrator, using the Contact Center Multimedia Administrator. For information about enabling or disabling these features, see *Avaya Aura™ Contact Center Server Administration* (NN44400-610).

After you accept the contact, you can view the customer details and a history of all past interactions with the contact center in the left pane, such as the most recent message sent by the customer, whether the customer's browser is still connected to the session, and whether the customer is currently typing a message. The right pane of Agent Desktop shows the tools used for Web communications:

- Send the Message—Add the comments from the Chat box to the Conversation frame.
- Push the URL—Send a selected URL to the customer's browser.
- Add the selected auto-phrase—Adds the selected auto-phrase to the Conversation frame.
- Select the text alignment—Change the direction of text from left to right to right to left and vice versa.
- E-mail chat log—Select the check box to e-mail a copy of the chat log to the customer.

Prerequisites

- Ensure that your status is set to Ready.
- Ensure that you have the skillset assigned to handle Web communications.

Procedure steps

Step	Action

1 On the work item, click **Accept**.

Attention: Your site administrator configures the maximum number of additional contacts you can manage.

--End--

Customizing a tab name

If you have multiple IM Web communications contacts, customize the tab name to identify the received contact.

Procedure steps

Step	Action
1	On the Agent Desktop right panel, double-click the required tab.
2	Type the <contact name>.

--End--

Variable definitions

Variable	Value
<contact name>	The keyword you use to identify the customer: for example, the first or last name.

Declining a Web communications contact

Decline a Web communications contact when you are not available to chat with a customer and you want to return the contact to the queue.

Procedure steps

Step	Action
1	On the work item, click **Reject**. *The contact returns to the queue and into Web-on-hold. Your status is set to Not Ready.*

--End--

Sending a chat message

Send a chat message to communicate privately with a customer in real time over the Internet.

Procedure steps

Step	Action
1	In the Chat box, type the text of your comments to the customer.
2	Click the **Send the Message** icon. *Your name or agent label appears in the Conversation frame, followed by your comments.*

--End--

Adding an auto-phrase to a chat message

Add an automatic phrase to a chat message when you want to select a commonly used phrase from a configured list.

Procedure steps

Step	Action
1	In the Chat box, select the Add the selected auto-phrase icon.
2	Select the auto-phrase to use from the list. *The automatic phrase is added to the Chat box. When the chat message is completed and saved, the automatic phrase is added to the Conversation frame and the Text Chat log.*

--End--

Pushing a Web page to a customer

Push a Web page to a customer's browser if you decide that a Web page can assist with the contact. Use the Page Push feature to push a Web page. The customer can also push a Web page to your browser.

Page Push has the following limitations:

- Some Web pages do not appear the same when pushed to the other person's browser. For example, with Web pages that can be personalized to display weather or news, each person sees their own version of the page.

- Dynamic pages that are customized through the use of cookies can appear differently because you and the customer each have separate cookies. Cookies are never shared by you and the customer.
- Framed pages cannot be pushed completely. The URL defining the frameset is pushed, but the individual URLs in each frame are not pushed.
- After a page is pushed, if either you or the customer follows a link to another page, the other person does not see that change.
- If you and the customer both click the Push Page icon at approximately the same time, you both see the form that was pushed last. However, both URLs appear in the Text Chat log.

Procedure steps

Step	Action
1	In the **chat** box, select **Push the selected web page** icon.
2	Type the URL of the Web page to send to the customer.
3	Select the URL to push it. OR Select a predefined URL to send to the customer. *The page is pushed to the customer's browser and the URL is added to the Conversation frame and the Text Chat log.*

--End--

Transferring a chat session

Transfer a chat session to another available agent. You can transfer a chat session only once.

Procedure steps

Step	Action
1	Once you are into a chat session, click **Consult**.
2	In the left pane, under **Transfer to**, select the skillset from the drop-down list.
3	Click the appropriate agent name.
4	Click **Consult**. *The conversation window splits into two. In the **Consult Text Chat** window, you can inform the agent about the reason for the transfer.*
5	Click **Complete Transfer**.

The chat session is now transferred to the agent and is no longer displayed on your Agent Desktop. Your status is set to Ready.

--End--

Conferencing a chat session

Conference a chat session to another available agent. You can conference only one agent into a chat session.

Procedure steps

Step	Action
1	Once you are into a chat session, click **Consult**.
2	In the left pane, under **Transfer to**, select the skillset from the drop-down list.
3	Click the appropriate agent name.
4	Click **Consult**. *The conversation window splits into two. In the **Consult Text Chat** window, you can inform the agent about the reason for the conference.*
5	Click **Complete Conference**. *The **Consult Text Chat** window closes and the original Conversation window reappears. When the new agent begins typing, it is visible to all three participants.*
6	When you want to leave the conference, click **Close**. *A message appears in the Conversation window to indicate when a participant leaves the conference.*

--End--

Ending the Text Chat session

End the text chat session when the contact is completed. The text chat history is saved automatically and can be printed.

Procedure steps

Step	Action
1	Click **Finish**.
2	In the **Notes** box, enter notes about the contact.
3	If closed reasons are required, choose a closed reason.

4 Click **Close**.

5 Repeat step 1 to step 4 to close each additional Web communications contact.

--End--

Sending the chat log in an e-mail message

If your Contact Center is licensed for e-mail, you can send a copy of the completed text chat log by e-mail to the customer.

Procedure steps

Step	Action
1	Below the conversation window, select the envelop icon or the check box next to it to email the chat log to the customer.

--End--

Instant messaging

Use the Avaya Aura™ Agent Desktop Instant Message (IM) window to communicate with customers over the Internet in real time. You can use the Instant Message window to perform the following tasks:

- Accept an instant message.
- Decline an instant message.
- Send an instant message.
- Use an auto-phrase.
- View personnel using Contacts Presence.
- Consult on an instant message.
- Conference an instant message.
- Transfer an instant message.
- End an instant message.

You can perform the tasks with an agent from your contacts list in My Contacts tab or an agent from an Instant Experts group in CC Contacts tab.

When you request a Consult, Conference, or Transfer with another agent, the text that you type appears in a separate conversation window that is not visible to the customer. During the request, you can change a Consult or a Transfer to a Conference, or you can Close the request. When the other agent accepts a Conference or Transfer request, the conversation resumes in the Agent Desktop Conversation window.

Prerequisites for instant messaging

- Ensure that your contact center is SIP-enabled.
- Ensure that both you and the customer use Web browsers that work with JavaScript and frames.

Attention: Support is not available for microbrowsers or portable devices.

Navigation

- Accepting an instant message (page 108)
- Declining an instant message (page 108)
- Sending an instant message (page 109)
- Using an auto-phrase (page 109)
- Using suggested Web pages (page 110)

- Using spelling checker in an instant message (page 110)
- Viewing personnel using Contacts Presence (page 110)
- Transferring an instant message using Contacts Presence (page 111)
- Consulting on an instant message using Contacts Presence (page 112)
- Conferencing an instant message using Contacts Presence (page 112)
- Transferring an instant message using the work item control (page 113)
- Consulting on an instant message using the work item control (page 113)
- Conferencing an instant message using the work item control (page 114)
- Ending an instant message (page 114)

Accepting an instant message

Accept an instant message request to communicate with a customer. When an instant message contact is routed to you, it appears in the Telephony toolbar. The Accept and Reject buttons flash.

Prerequisites

- Ensure that you work with an Office Communications Server in your Contact Center.
- Ensure that your status is Ready.
- Ensure that you have been assigned a skillset to handle instant messages.

Procedure steps

Step	Action
1	On the new IM work item, click **Accept**. *The top pane of the Agent Desktop shows the customer details and history of all past interactions with the contact center. The bottom pane shows the text window and the tools available for instant messages.*

--End--

Declining an instant message

Decline an instant message request if you are sent a contact that you cannot receive. When an instant message contact is routed to you, it appears in the Telephony toolbar. The Accept and Reject buttons flash.

Procedure steps

Step	Action
1	On the work item, click **Reject**.
	The contact is placed back in the queue.

--End--

Sending an instant message

Send a response to an instant message that you accepted from a customer.

Procedure steps

Step	Action
1	In the text box, type your comments to the customer.
2	Review your comments before you send them by using the scroll bars if necessary.
3	Click **Send**.
	Your name or agent label appears before your comments in the conversation frame.

--End--

Using an auto-phrase

Use an automatic phrase to add commonly used text to an instant message. The administrator defines automatic phrases using the Contact Center Multimedia Administrator.

Procedure steps

Step	Action
1	In the Conversation window, click **Suggest Phrase**.
2	Click the automatic phrase to use from the list.
	The automatic *phrase is added to the Conversation preview window.*
3	Edit the text if necessary.
4	Click **Send**.

--End--

Using suggested Web pages

Use a suggested Web page to add a commonly used Web page URL to an instant message. The administrator defines suggested Web pages using the Contact Center Multimedia Administrator.

Procedure steps

Step	Action
1	In the Conversation window, click **Suggest Web Page**.
2	Click the Web page you want to use from the list. *The Web page is added to the Conversation preview window.*
3	Click **Send**.

--End--

Using spelling checker in an instant message

Use the spelling checker to check spelling before you send an instant message.

Procedure steps

Step	Action
1	In the Conversation window, click Spell Check (ABC icon).
2	Click the appropriate button when the spelling checker highlights a word that is not found in the dictionary.
3	When the spelling checker is complete, click **Send**.

--End--

Viewing personnel using Contacts Presence

View personnel in your contact center using Contacts Presence. You can view all personnel or a subset of them according to their current status (for example, Available, Busy, Do Not Disturb, Inactive, Offline, or Away).

Contacts presence control has two tabs: My Contacts and CC Contacts. The My Contacts tab lists contacts that you configure with Microsoft Office Communicator (OC). The CC Contacts tab lists the Instant Experts groups that a site administrator configures.

A site administrator can configure default Instant Experts groups to load automatically after you log on to Agent Desktop. The name of the default Instant Expert groups have an underscore in front, for example, _autoload. Other skillset-associated and keyword-associated Instant Experts groups appear after you accept an incoming contact. The default Instant Experts groups appear first in the list of groups.

After confirming that a contact is available by using Contacts Presence, you can send, consult on, transfer, or conference an instant message to the contact.

Procedure steps

Step	Action
1	On the Agent Desktop, click **Contacts Presence**.
2	To view your contacts, click **My Contacts** tab.
3	To view Instant Experts groups, click **CC Contacts** tab.

--End--

Transferring an instant message using Contacts Presence

Transfer an instant message to another person, after you confirm that the person is available by using Contacts Presence.

Procedure steps

Step	Action
1	On the Agent Desktop, click **Contacts Presence**.
2	To transfer a message to an agent from your list, click **My Contacts** tab and perform step 4 to step 6.
3	To transfer a message to an agent from an Instant Experts group, click **CC Contacts** tab and perform step 4 to step 6.
4	Determine the person you want to transfer the instant message to, and confirm that they are available.
5	Right-click the name of the person and click **Transfer**. *The person you want to transfer the instant message to must click Accept. The current instant message text then appears in the person's Conversation window.*
6	Click **Complete Transfer**. *The instant message is now transferred to the person and is no appears on your Agent Desktop.*

--End--

Consulting on an instant message using Contacts Presence

Consult on an instant message with another person after you confirm that the person is available by using Contacts Presence.

Procedure steps

Step	Action
1	On the Agent Desktop, click **Contacts Presence**.
2	To consult an agent from your contacts list, click **My Contacts** tab, and perform step 4 to step 6.
3	To consult an agent from an Instant Experts group, click **CC Contacts** tab, and perform step 4 to step 6.
4	Determine the person with whom you want to consult, and confirm that they are available.
5	Right-click the name of the person, and then click **Consult**. *The person you want to consult must click Accept. The current instant message text then appears in the person's Conversation window.*
6	When your conversation is complete, click **Close**.

--End--

Conferencing an instant message using Contacts Presence

Conference an instant message with another person after you confirm that the person is available by using Contacts Presence.

Procedure steps

Step	Action
1	On the Agent Desktop, click **Contacts Presence**.
2	To conference with an agent from your contacts list, click **My Contacts** tab, and perform step 4 to step 7.
3	To conference with an agent from an Instant Experts group, click **CC Contacts** tab, and perform step 4 to step 7.
4	Determine the person with whom you want to consult, and confirm that they are available.
5	Right-click the name of the person, and click **Conference**. *A new Conversation window appears.*

6 Click **Complete Conference**.

The new Conversation window closes and the original Conversation window reappears. When the new person begins typing, the participant list above the text displays updated contact information for all participants in the conference.

7 To leave the conference, click **Close**.

A message in blue appears in the Conversation window to indicate when a participant leaves the conference. The departure is added as an Action to the Contact History.

--End--

Transferring an instant message using the work item control

Transfer an instant message to another available agent using the work item control.

Procedure steps

Step	Action
1	On the work item, click the **Transfer** control.
2	Determine the person you want to transfer the instant message to, and confirm that they are available.
3	Right-click the name of the person and click **Transfer**. *The person you want to transfer the instant message to must click Accept. The current instant message text then appears in the person's Conversation window.*
4	Click **Complete Transfer**. *The instant message is now transferred to the person and is no longer displayed on your Agent Desktop. Your status is set to Ready.*

--End--

Consulting on an instant message using the work item control

Consult on an instant message with another available person using the work item control.

Procedure steps

Step	Action
1	On the work item, click the **Conference** control.

2 Determine the person with whom you want to consult, and confirm that they are available.

3 Right-click the name of the person and then click **Consult**.

The person you want to consult must click Accept. The current instant message text then appears in the person's Conversation window.

4 When your conversation is complete, click **Close**.

--End--

Conferencing an instant message using the work item control

Conference an instant message to another available agent using the work item control.

Procedure steps

Step	Action
1	On the work item, click the **Conference** control.
2	Determine the person with whom you want to conference, and confirm that they are available.
3	Right-click the name of the person and click **Conference**. *A new Conversation window appears.*
4	Click **Complete Conference**. *The new Conversation window closes and the original Conversation window reappears. When the new person begins typing, the participant list above the text displays updated contact information for all participants in the conference.*
5	When you want to leave the conference, click **Close**. *A message in blue appears in the Conversation window to indicate when a participant leaves the conference. The departure is added as an Action to the Contact History.*

--End--

Ending an instant message

End an instant message when the contact is complete.

Procedure steps

Step	Action

1 Click **Close**.

--End--

Agent Statistics

Avaya Aura™ Agent Desktop displays live skillset related statistics. Agents can display assigned skillset statistics in pie chart or bar chart format. Supervisors can display statistics for all skillsets.

Agent Desktop Statistics are generated by accessing the Contact Center Web Statistics (CCWS) on the Contact Center Manager Server (CCMS). This is a licensed feature.

The main Statistics tab parts are:

- **Control**: Used to select charts types
- **Skillsets**: Used to display and select skillsets
- **Charts**: Used to display charts

Control

- Refresh: reloads and resets the skillsets list in the skillset area.
- Sort: Alphabetical sort of skillset icons. Due to contact type prefixes on the skillsets names the skillsets are also sorted by contact type.
- Pie/Bar: Dynamically changes between pie and bar charts in the chart display area.
- Agents: Select agent related statistics
- Contacts: Select skillset related statistics
- Alerts: Activate or de-activate the Outlook style alerts if skillsets Service Level falls below the threshold defined Contact Center Manager Administration.

Skillsets
Displays a skillset icon for each available or assigned skillset. Supervisors in a multimedia environment see all skillsets. Selecting a skillset icon updates the chart with the latest statistics for that skillset.

The percentage figures on the skillset icons represent the current Service Level for the skillset. The icons change to red if the current Service Level fails below the CCMA-defined threshold.

Charts
The chart area displays a pie or bar chart.

This chapter describes how to use the Statistics tab.

Prerequisites for Agent Statistics

- Ensure that you have a Contact Center Web Statistics (CCWS) license.

Attention: Support is not available for microbrowsers, such as those available for Win CE 2.0, WinTV, PDAs, or other portable devices.

Navigation

- Accessing the Agent Statistics tab (page 118)
- Viewing the Skillset statistic chart (page 118)
- Viewing the Agent statistic chart (page 119)
- Enabling Service Level alerts (page 119)
- Using the Statistics Ticker (page 120)

Accessing the Agent Statistics tab

Access the Agent Statistic tab to define and view agent and skillset charts.

Prerequisites

- Ensure that your status is set to Logged on.

Procedure steps

Step	Action
1	On the Agent Desktop Top bar, click **User Preferences**. *The User Preference and Statistics tabs appear on the left hand side of the Agent Desktop.*
2	Select the **Statistics** tab, to display the Agent Statistics tab and controls.

--End--

Viewing the Skillset statistic chart

View the skillset statistics chart to monitor statistics for the current skillset.

Prerequisites

- Ensure the agent is a member of all necessary skillsets.

Procedure steps

Step	Action
1	On the Agent Desktop statistics tab, select **Contacts**.
2	In the Skillset control, select the skillset to see the statistics. *A chart is displayed in the chart area showing the statistics.*
3	You can toggle between a pie and bar chart by clicking the pie bar button on the main statistics tab.

--End--

Viewing the Agent statistic chart

View the agent statistics chart to monitor statistics for agents in a skillset.

Procedure steps

Step	Action
1	On the Agent Desktop statistics tab, select Agents.
2	In the Skillset control, select the skillset for which you want to see Agent-related statistics. *A chart is displayed in the chart area showing the statistics.*
3	You can toggle between a pie and bar chart by clicking the pie bar button on the main statistics tab.

--End--

Enabling Service Level alerts

Activate Outlook style alerts if skillsets Service Level falls below the CCMA defined threshold.

Procedure steps

Step	Action
1	On the Agent Desktop statistics tab, click the **Alerts** check box to enable Service Level alerts. *If a skillset Service Level falls below the CCMA defined threshold a alert message box appears on the bottom right hand side of the screen. Clicking on this alert box automatically opens the Agent Desktop statistics tab.*

--End--

Using the Statistics Ticker

The Agent Desktop Action bar contains an Agent Statistics Ticker. The Agent Statistics Ticker displays assigned skillsets, contacts waiting (in square brackets), and skillset name on a scrolling display that loops every 30 seconds.

Procedure steps

Step	Action
1	On the Agent Desktop Action bar, click **Agent Statistics** to show or hide the **Agent Statistical Ticker**.
2	On the **Agent Statistical Ticker**, click the **>** icon to advance to the next skillset.
3	On the **Agent Statistical Ticker**, click on any item in the ticker box to display the Agent Desktop **Statistics** page.
4	To shown or hide **Agent Statistical Ticker**, click the button immediately to the left of it.

--End--

Customer and contact details

Use the Multimedia component to create, search, view, and edit customer and contact details. With Avaya Aura™ Agent Desktop, you can perform the following tasks:

- Create a customer record.
- Search for a customer.
- Add or edit customer information.
- Search for a contact.
- Print search results.
- View a contact.
- Open a contact.
- Close contacts (supervisors only).

On the Customer Details tab, you can view Communication Control Toolkit (CCT) intrinsics.

Attention: Voice Contact Intrinsics are supported only in SIP-enabled contact centers.

Prerequisites for working with customer and contact details

- Ensure that you have permission to handle multimedia contacts, such as e-mail, instant message, voice mail.
- Ensure that you are a supervisor if you want to close multiple contacts.

Navigation

- Creating a customer record (page 122)
- Searching for a customer (page 123)
- Adding or editing customer information (page 123)
- Viewing a CCT intrinsic (page 124)
- Copying a CCT intrinsic (page 124)
- Viewing the Auto Launch Application (page 125)
- Running a CCT intrinsic-associated application (page 125)
- Searching for a contact (page 126)
- Printing search results (page 127)
- Viewing a contact (page 127)

- Opening a contact (page 128)
- Closing contacts (supervisors only) (page 129)

Creating a customer record

Create a customer record if the multimedia database does not currently have information about a customer. You can type the information directly into the dialog box, or you can copy text from an open contact into the customer details information.

You must enter either a telephone number, e-mail address, or SIP Uri for a valid customer record. Entering only a customer name does not create a customer record in the database.

If you create more than one e-mail address for a customer, you must select a default e-mail address to use when you begin a contact with the customer.

Prerequisites

- Ensure that you have no customer records currently open.

Procedure steps

Step	Action
1	In the **Customer Details** window, click **Create**.
2	In the **Title** box, select a salutory title for the customer.
3	In the **Last Name** box, type the surname of the customer.
4	In the **First Name** box, type the given names for the customer.
5	In the **E-mail Address** box, type an e-mail address for the customer.
6	In the **SIPUri** box, enter a SIP URI for the customer.
7	In the **Phone Type** box, select the type of phone number.
8	In the remaining telephone number boxes, type the international code, area code, and telephone number.
9	Click **Save**.

--End--

Searching for a customer

Search for a customer to view or edit customer details or if you want to create or review a customer contact.

You can search for a customer based on one or more of the following criteria:

- First name
- Last name
- Preferred agent (the agent who typically handles the contacts for the customer, based on who created the customer record, who handled the first contact by the customer, or who clicked Take Ownership of the customer record)
- Address
- Phone number
- E-mail address
- SipUri

Prerequisites

- Ensure that the Action bar is visible.

Procedure steps

Step	Action
1	Click **Customer Search**.
2	In the first column, select the criteria to use for the search (for example, last name or phone number).
3	In the second column, select the logical operators for the search criteria (for example, is or is not).
4	In the third column, type your search value (for example, Smith).
5	Click **Search**.
6	To sort the search results by a column, click the column heading of the field by which you want to sort.
7	Double-click the customer record to open.

--End--

Adding or editing customer information

Add or edit customer information when a change to a customer record is required.

Prerequisites

- Ensure that you have no customer records currently open.

Procedure steps

Step	Action
1	Click the **Details** tab of the Customer Details pane.
2	Click **Edit** to change the customer information or **Add** to add new information to the customer details.
3	Select the information to add or change.
4	Copy and paste the information from the text of a contact, or type the information into the field.
5	If you add additional telephone numbers or e-mail addresses, be sure to select one as the default.
6	Click **Save**.

--End--

Viewing a CCT intrinsic

View a CCT intrinsic to copy the intrinsic or start an associated application.

Prerequisites

- You must accept a contact.

Procedure steps

Step	Action
1	On the Agent Desktop window, click **Customer Details**.
2	In the **Custom Fields** section, click the **Intrinsic** tab. The CCT intrinsics appear.

--End--

Copying a CCT intrinsic

Copy a CCT intrinsic to use the intrinsic in another application.

Procedure steps

Step	Action

1. On the Agent Desktop window, click **Customer Details**.
2. In the **Custom Fields** section, click the **Intrinsics** tab.
3. Right-click the required CCT intrinsic.
4. Click **Copy**.

--End--

Viewing the Auto Launch Application

You can view the Auto Launch Application to identify which default application starts after you accept a voice contact.

Prerequisites

- You must accept a voice contact.

Procedure steps

Step	Action
1	On the Agent Desktop, click **Customer Details**.
2	In the **Custom Fields s**ection, click the **Intrinsics** tab. In the **Auto Launch Application** section, the default application appears with a check mark.

--End--

Running a CCT intrinsic-associated application

If you need an application to manage a voice contact, run a CCT intrinsic-associated application.

Prerequisites

- You must accept a voice contact.

Procedure steps

Step	Action
1	On the Agent Desktop window, click Customer Details.
2	In the **Custom Fields** section, click the **Intrinsics** tab.
3	Right-click the required CCT intrinsic value.
4	Select the required application.

--End--

Searching for a contact

Search for a contact to create or review a customer contact.

You can search for a contact based on one or more of the following criteria:

- Agent (is, is not)
- Last action (is, is not)
- ID (less than, equal to, greater than)
- Subject (contains, begins with, ends with)
- Status (is, is not)
- Closed reason (is, is not) activity code
- Closed date (before, on, after)
- Skillset (is, is not)
- Type (is, is not) of contact
- Disposition code (is, is not)
- Mail To (contains, begins with, ends with)
- Mail From (contains, begins with, ends with)
- Arrival date (before, on, after)

The search results display the Agent who worked most recently on the contact.

If the search results in more contacts than one page can show, use the arrows to move to the Next, Previous, First, and Last page of the search results.

Prerequisites

- Ensure that the Action bar is visible.

Procedure steps

Step	Action
1	Click **Contact Search**.
2	In the first column, select the criteria to use for the search (for example, Status or Skillset).
3	In the second column, select the logical operators for the search criteria (for example, is or is not).
4	In the third column, type your search value (for example, Closed).

5 Click Search.

6 To sort the search results by a column, click the column heading of the field by which you want to sort.

7 Double-click the contact to open.

--End--

Printing search results

You can print the search results of either a customer or contact search.

Prerequisites

- Ensure that you have a printer set up and that you know the correct printer settings to select.

Procedure steps

Step	Action
1	Generate the search results for a customer or contact search.
2	Click **Print**.
3	Select the correct settings for your printer.

--End--

Viewing a contact

View a contact if you want to review information for a contact, for example, to see how an agent handled a particular contact.

You cannot change information in the contact because the contact is not open.

Prerequisites

- Ensure that your status is Not Ready.

Procedure steps

Step	Action
1	On the **History** tab of the **Customer Details** window, select the contact to open.
2	Right-click and select **Read-only Contact**. *You can also double-click a contact to open the contact details.*

3	View the contact details on the right pane of the Agent Desktop window.

--End--

Opening a contact

Open a contact to add or edit information, to complete an outbound call, or to send a reply to an e-mail message.

You can open a contact only if you have ownership of the customer on the contact.

Prerequisites

- Ensure that your status is Not Ready.
- Ensure that no other agent is currently working on the contact.

Procedure steps

Step	Action
1	On the **History** tab of the **Customer Details** window, select the contact to open.
2	If **Take Ownership** appears on the **Contact History** tab, another agent currently owns the customer and you cannot open this contact. If necessary, click **Take Ownership** to own the customer and click **Yes** to confirm.
3	Ensure that your status is **Not Ready**.
4	Right-click and select **Pull Contact**. *If the Pull Contact item is not available, another agent currently has the contact open and you can only view the contact.*
5	Click **Yes** to open the contact. *The Agent Desktop automatically changes your status to Ready, answers the pulled contact, and then automatically changes your status to NotReady again.*
6	View the contact details on the right pane of the Agent Desktop window. *You can now complete an outbound call, reply to an e-mail message, or add an attachment to an e-mail message.*

--End--

Closing contacts (supervisors only)

Supervisors can close contacts, if they want to remove a single contact or a group of contacts, by changing the contact status from Open to Closed.

You must enter a reason for closing contacts.

Prerequisites

- Ensure that you are a supervisor.
- Ensure that no agent is currently working on any contact that you want to close.

Procedure steps

Step	Action
1	Select the contact to close or select multiple contacts by pressing the **Ctrl** key while you click each contact. *Selected contacts are highlighted blue.*
2	Right-click and select **Close All**.
3	In the **Close Contact Details** window, type the reason for closing the selected contacts.
4	Click **Close**.

--End--